MOBIUS Course Outline

Overview of MOBIUS

Navigation Techniques

Modifying the Display

Changing the Font

Moving Columns

Copying Columns

Hiding Columns

Freezing Columns

Exporting Data and Creating Polices

Export data into Excel

Load an existing policy

Create a policy

Export the policy data into Excel

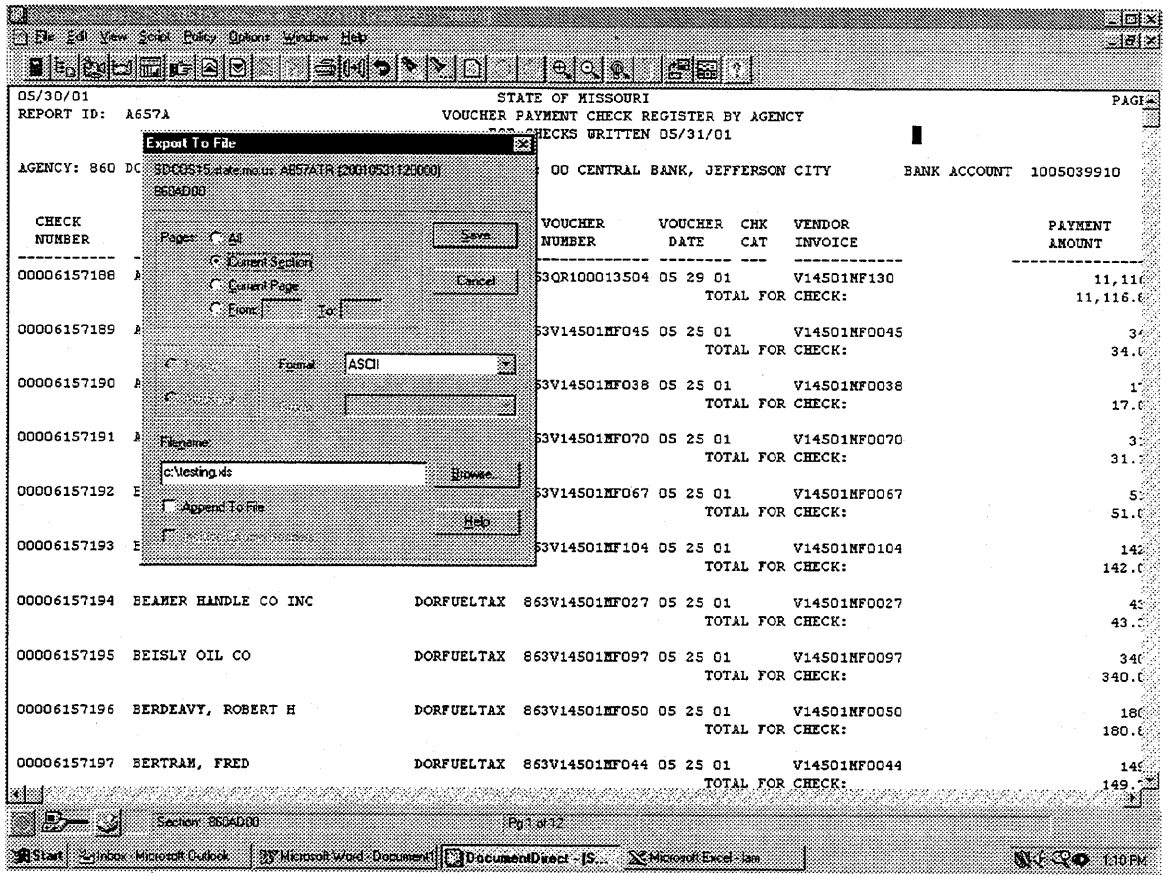
Scripts

Create a script

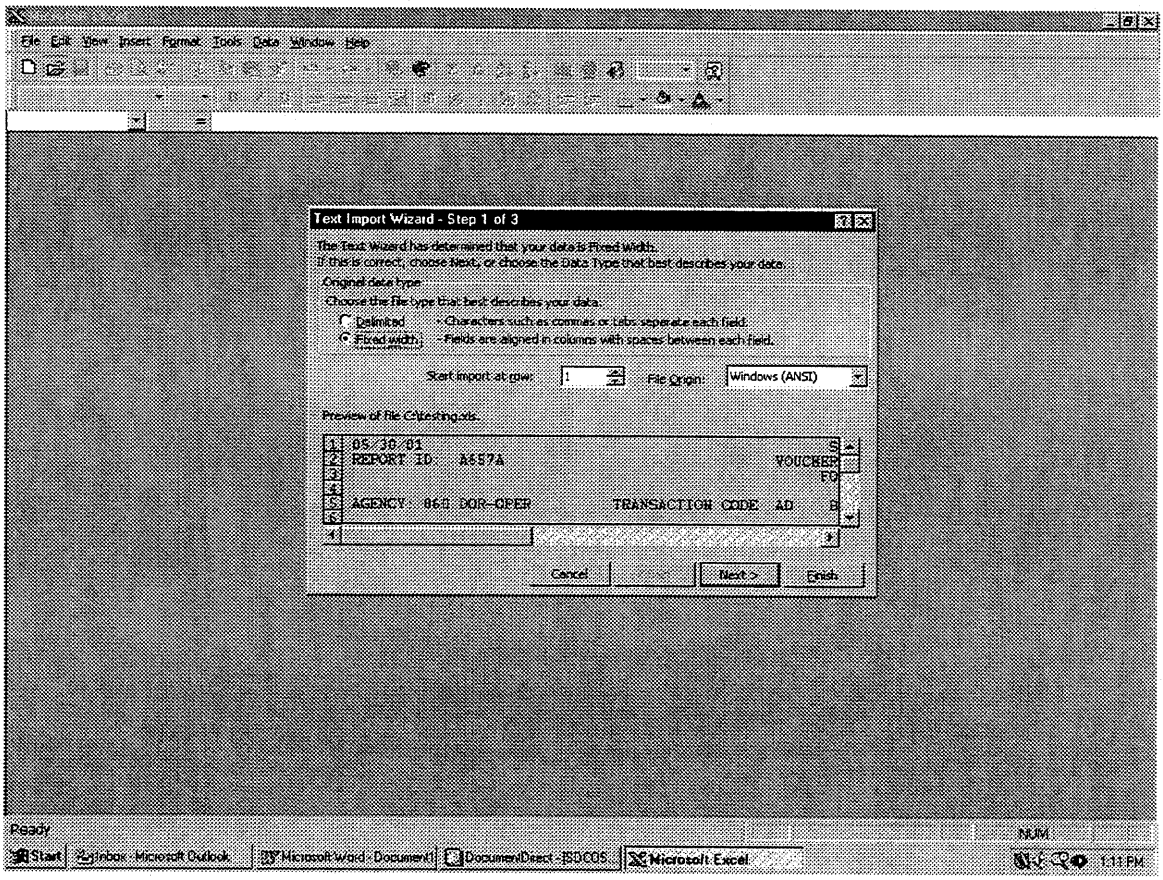
Run the script

Printing

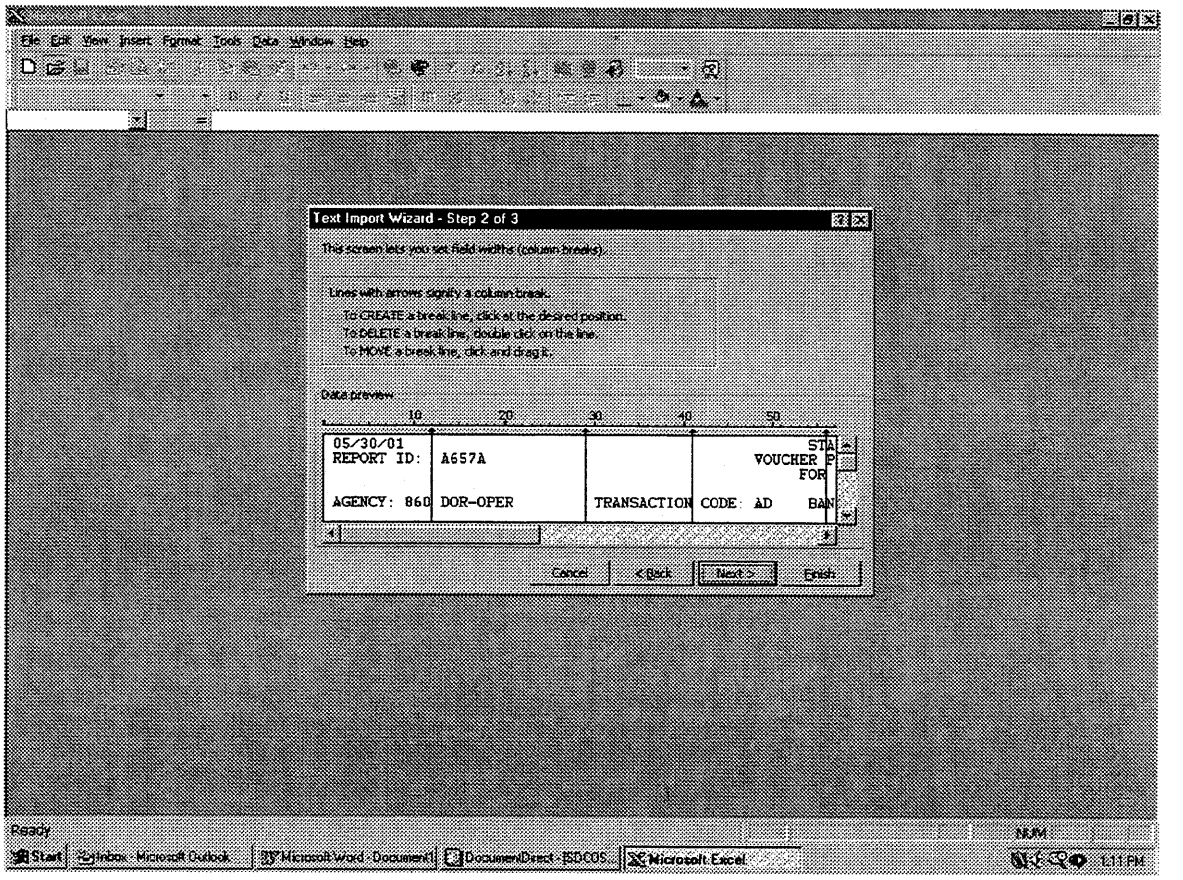
Print dialog box



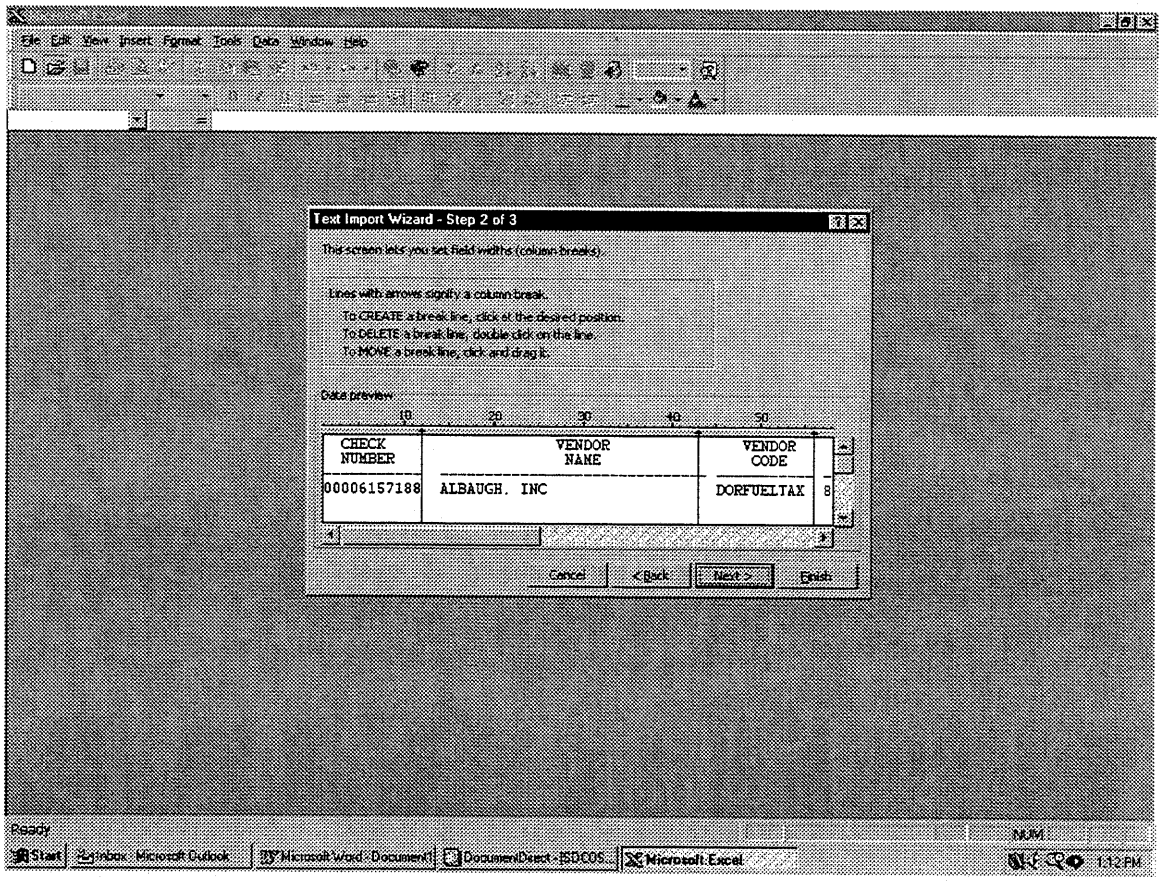
MOBIUS is used to view the information in the reports. To manipulate the data you may want to export the data into an external application such as Excel or Word. When the data is exported into Excel you can sort the information and sum values.



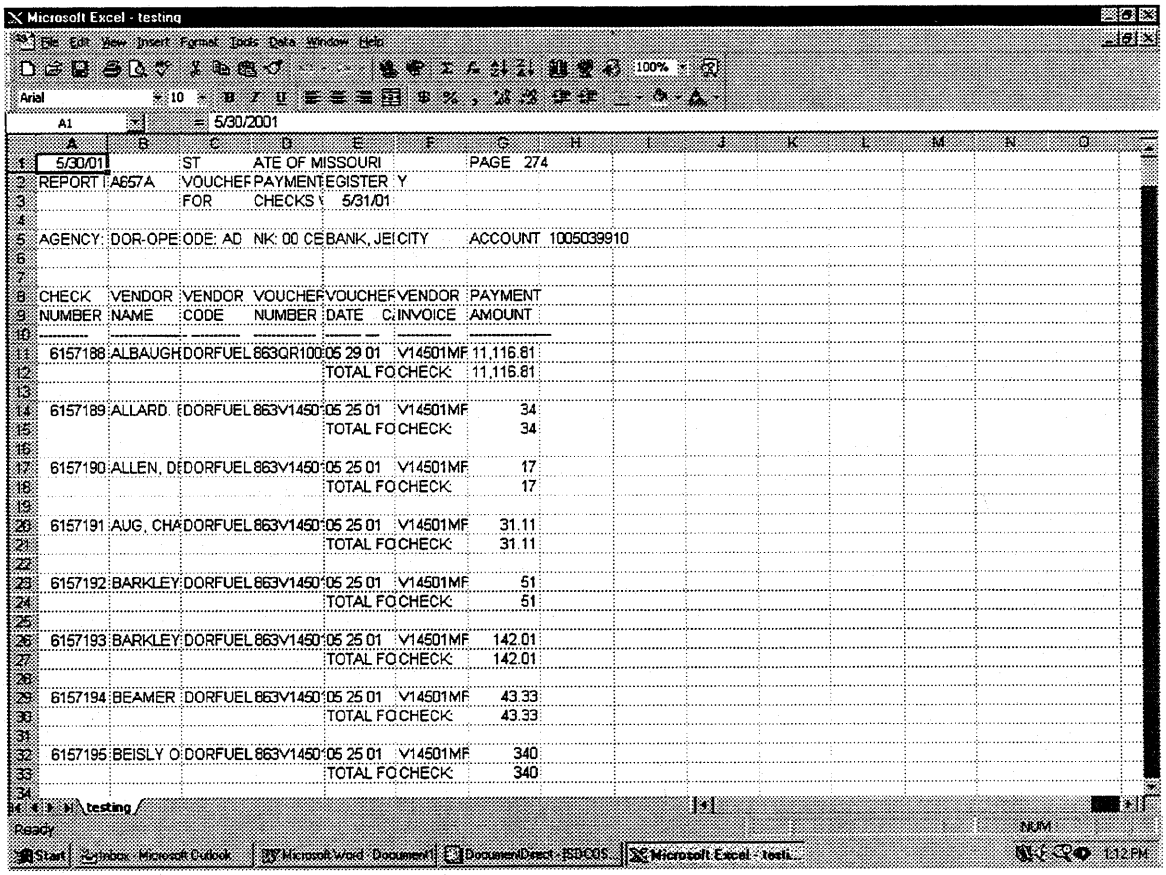
If the data is separated into columns Fixed Width is the correct choice. Click on the Next button.



In the Step 2 of the Wizard the column breaks can be manipulated. To delete a column break double click on the line representing the break. To create a break single click in the area to place the column break. To move a column break click and drag the line. Click on the Finish button.

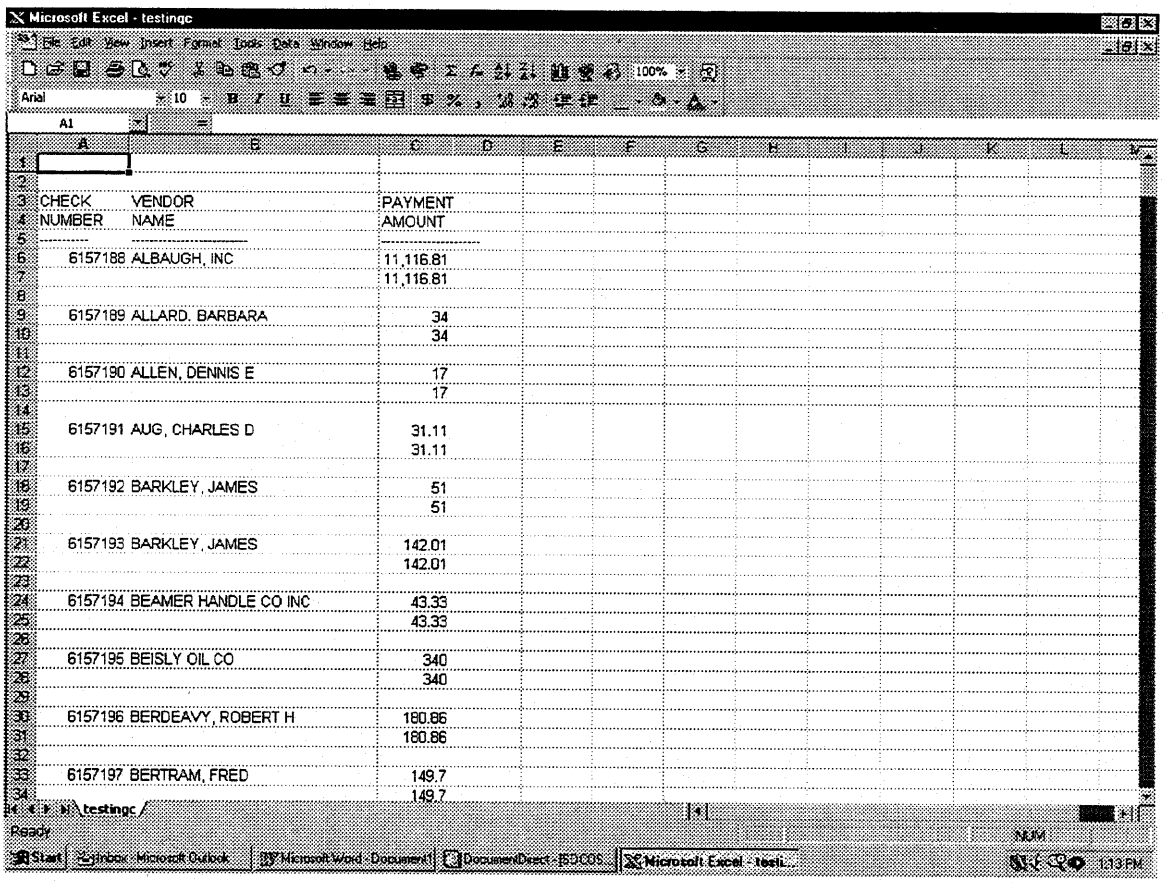


In Step 2 on the wizard proofread the column breaks. If changes need to be made click on the Back button. If the column breaks are correct click on the Finish button.

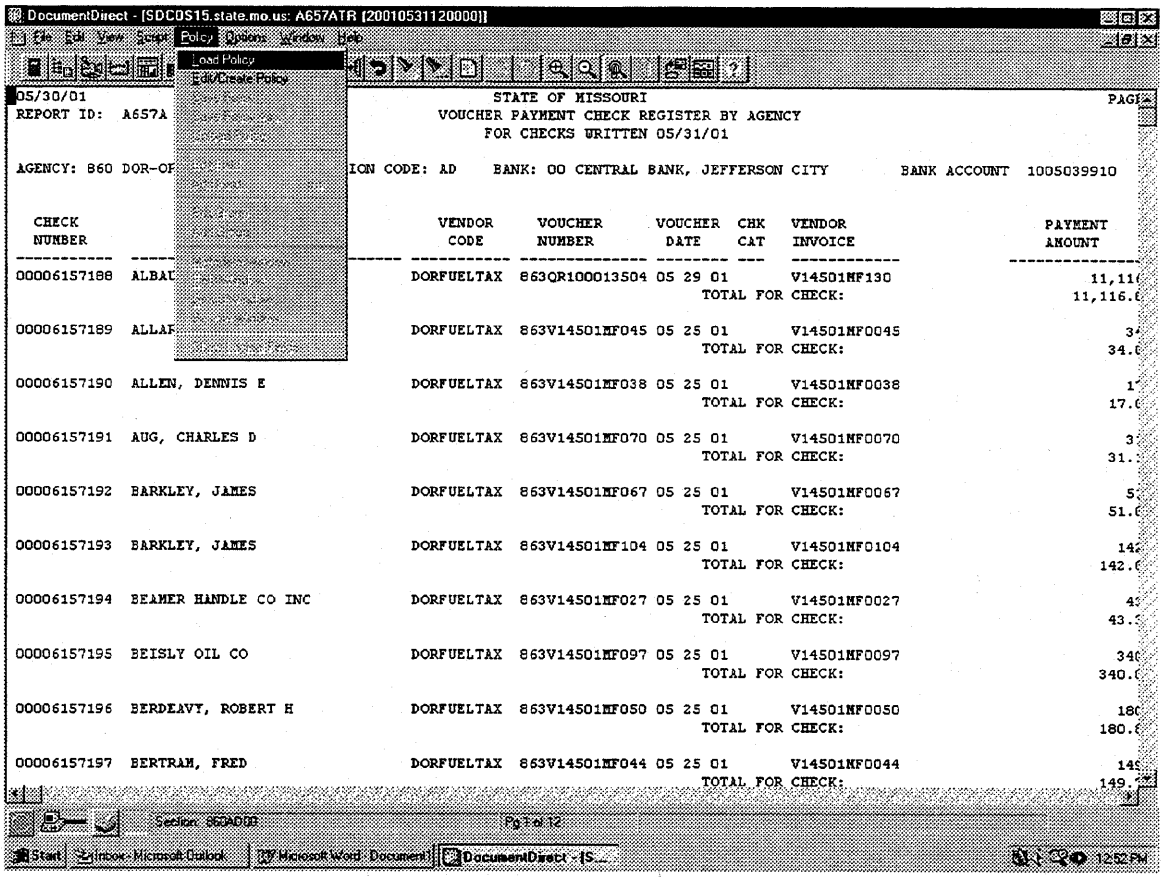


	A	B	C	D	E	F	G	H
1	5/30/01		ST	ATE OF MISSOURI			PAGE 274	
2	REPORT I	A657A	VOUCHEF	PAYMENT	EGISTER	Y		
3			FOR	CHECKS	5/31/01			
4								
5	AGENCY:	DOR-OPE	ODE: AD	NK: 00 CE	BANK, JE	CITY	ACCOUNT	1005039910
6								
7								
8	CHECK	VENDOR	VENDOR	VOUCHER	VOUCHER	VENDOR	PAYMENT	
9	NUMBER	NAME	CODE	NUMBER	DATE	C. INVOICE	AMOUNT	
10								
11	6157188	ALBAUGH	DORFUEL	863GR100	05 29 01	V14501MF	11,116.81	
12					TOTAL FO	CHECK	11,116.81	
13								
14	6157189	ALLARD,	DORFUEL	863V1450	05 25 01	V14501MF	34	
15					TOTAL FO	CHECK	34	
16								
17	6157190	ALLEN, DE	DORFUEL	863V1450	05 25 01	V14501MF	17	
18					TOTAL FO	CHECK	17	
19								
20	6157191	AUG, CHA	DORFUEL	863V1450	05 25 01	V14501MF	31.11	
21					TOTAL FO	CHECK	31.11	
22								
23	6157192	BARKLEY	DORFUEL	863V1450	05 25 01	V14501MF	51	
24					TOTAL FO	CHECK	51	
25								
26	6157193	BARKLEY	DORFUEL	863V1450	05 25 01	V14501MF	142.01	
27					TOTAL FO	CHECK	142.01	
28								
29	6157194	BEAMER	DORFUEL	863V1450	05 25 01	V14501MF	43.33	
30					TOTAL FO	CHECK	43.33	
31								
32	6157195	BEISLY O	DORFUEL	863V1450	05 25 01	V14501MF	340	
33					TOTAL FO	CHECK	340	
34								

This is an example of exporting all the data from the report. The header information needs modified and the Payment Amount is listed twice, once for the voucher entry and once for the check total.



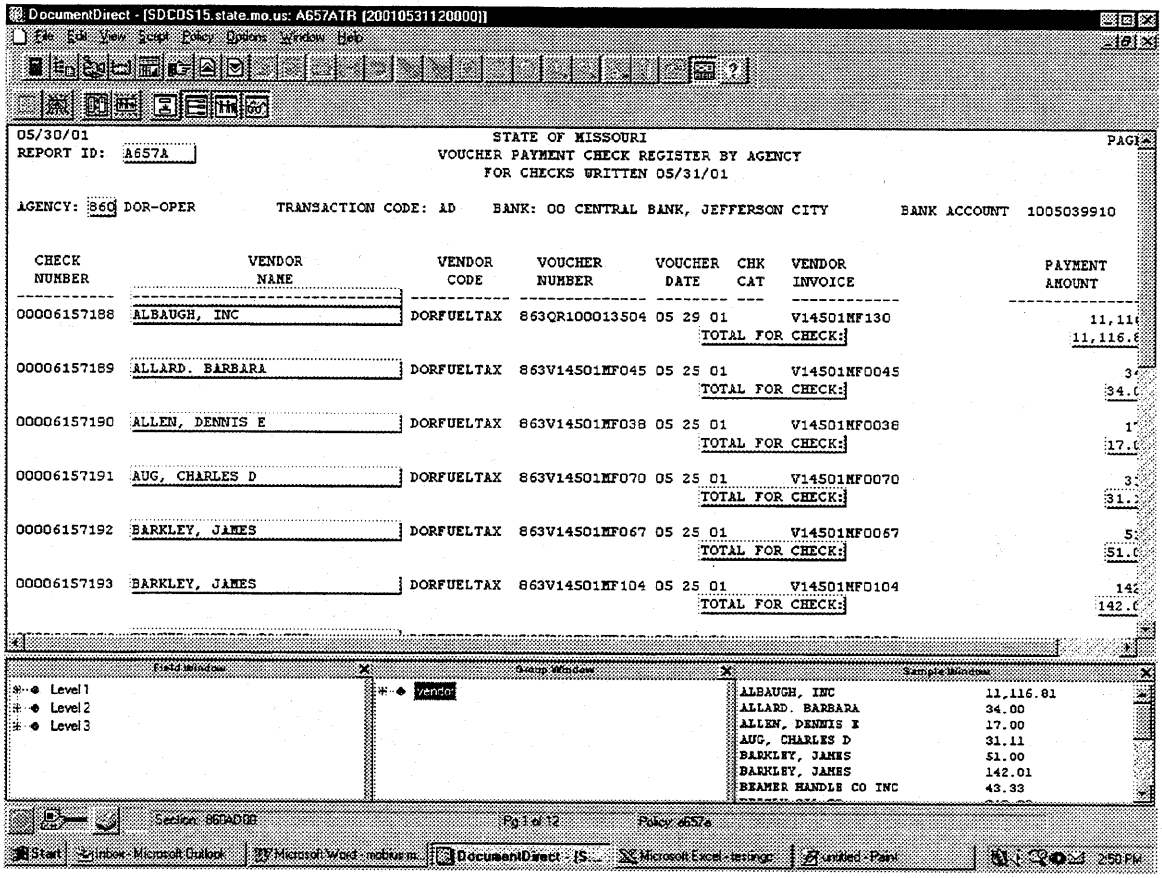
In this example the report header information has been hidden. The Check Number, Vendor Name and Payment Amount are the only columns chosen to export, the remaining columns were hidden before the export.



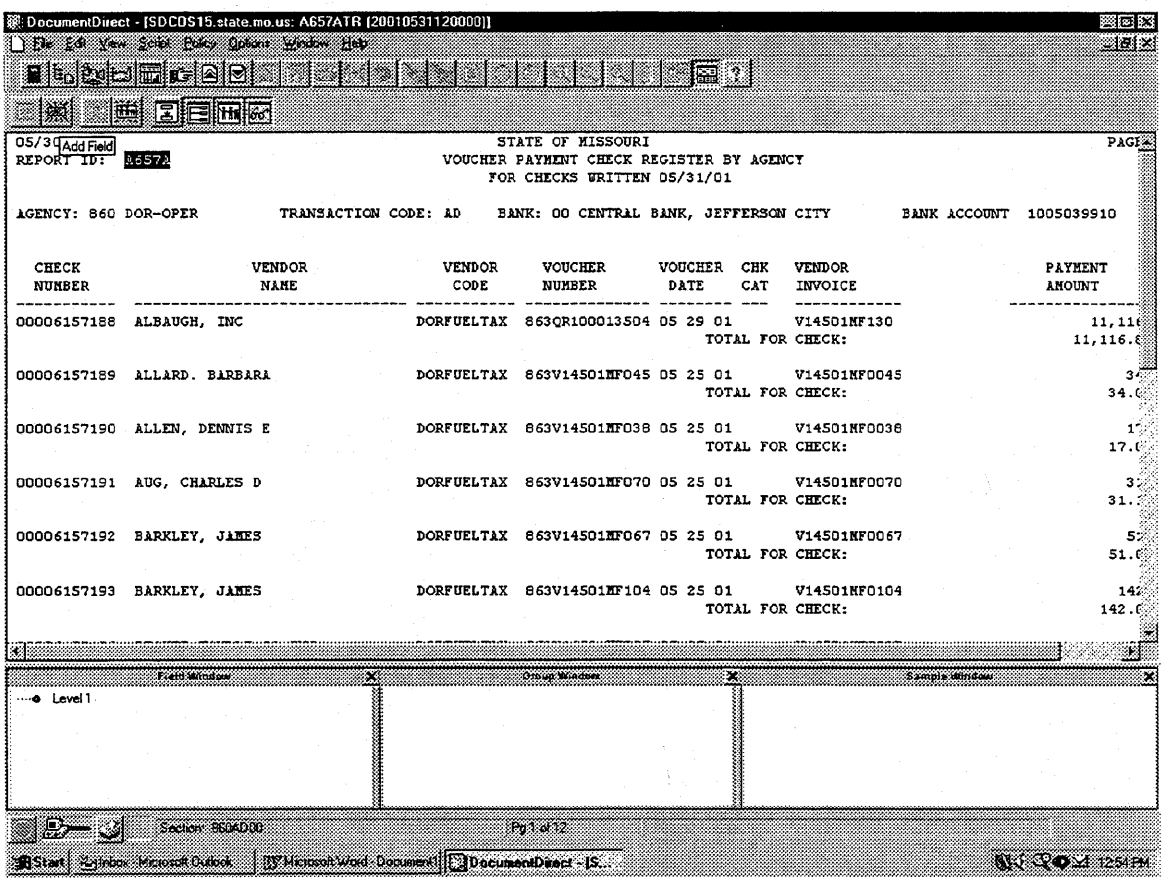
A policy will allow you to extract just the data you need before you export into an external application such as Excel. In our next exercise we will load an existing policy and show you the results when we export into Excel.

To begin using an existing policy it is necessary to load that policy. Click on the Policy option on the menu bar and choose Load Policy. Then open the policy you want to load.

You will not see a difference on the report display until you choose to Edit the policy. Edit mode will allow you to see what fields have been placed in the policy and how the fields are related.



The report display should have several viewing changes. There will be an additional toolbar appear that is specific to the policy window. The fields in the policy have boxes drawn around them as a highlighting mechanism. There will be three additional windows appear at the bottom of the window. The field window shows information regarding each field created in the policy. The group window gives information regarding the groups created in the policy. The sample window shows the information that will be exporting using this group in the policy.



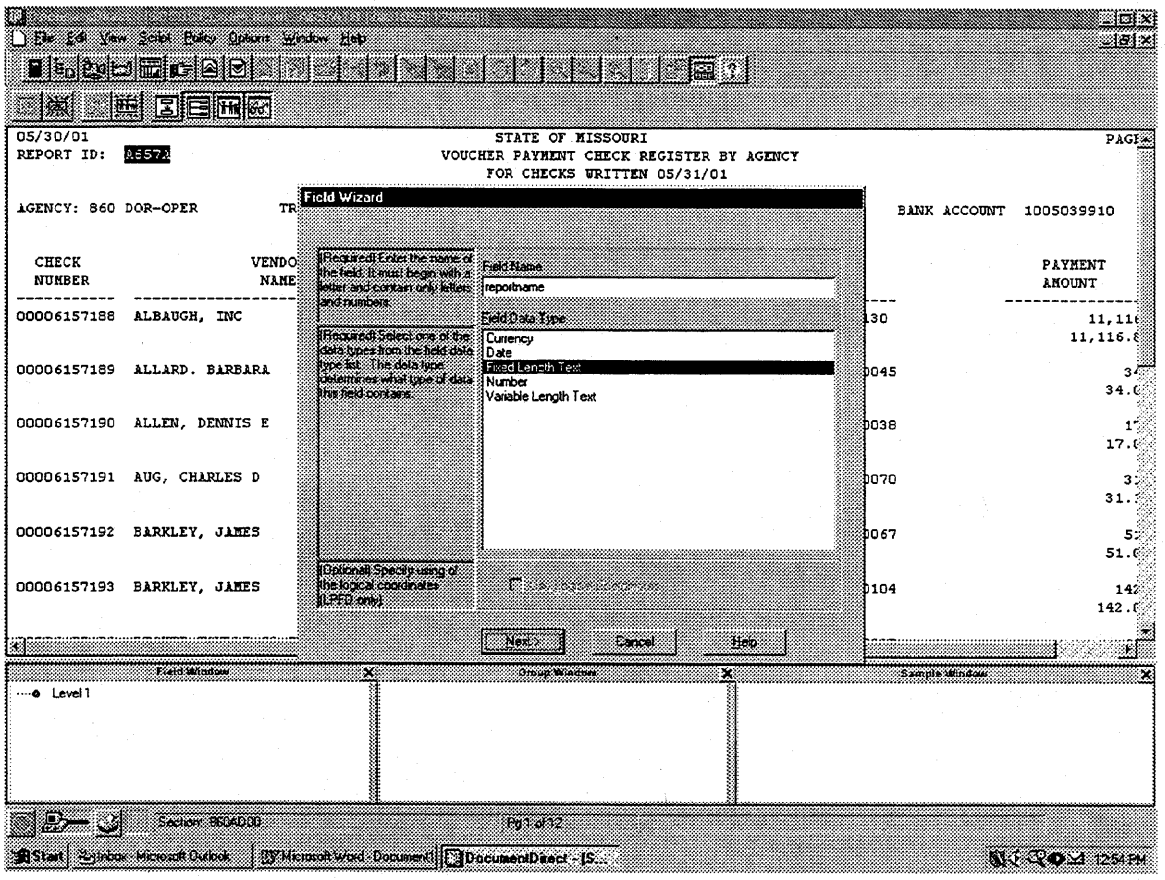
In our next exercise we will be creating the policy we loaded in our previous exercise. Before we begin we need to explain the levels of the fields.

Level 1 fields are report identifiers, such as the report name

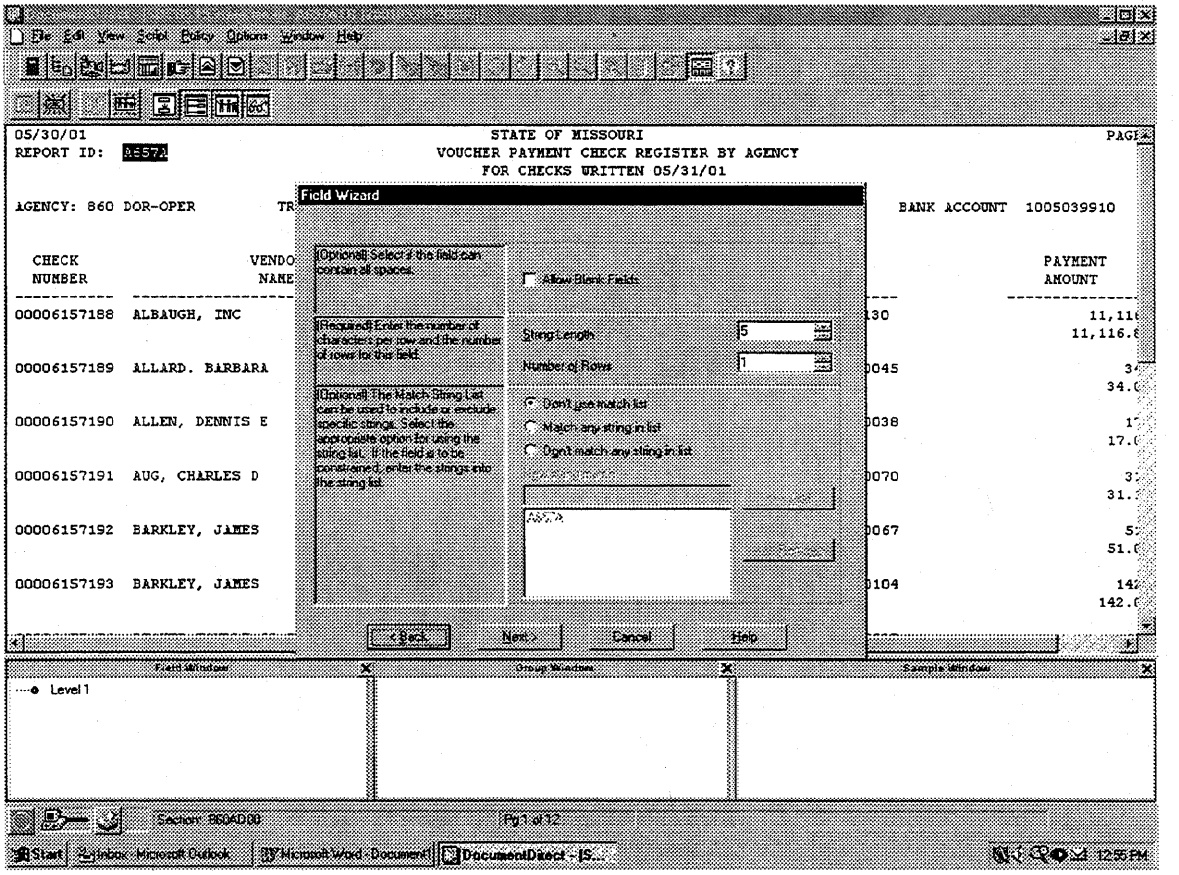
Level 2 fields are field names or locators for the data fields

Level 3 fields are the actual data fields we want to extract

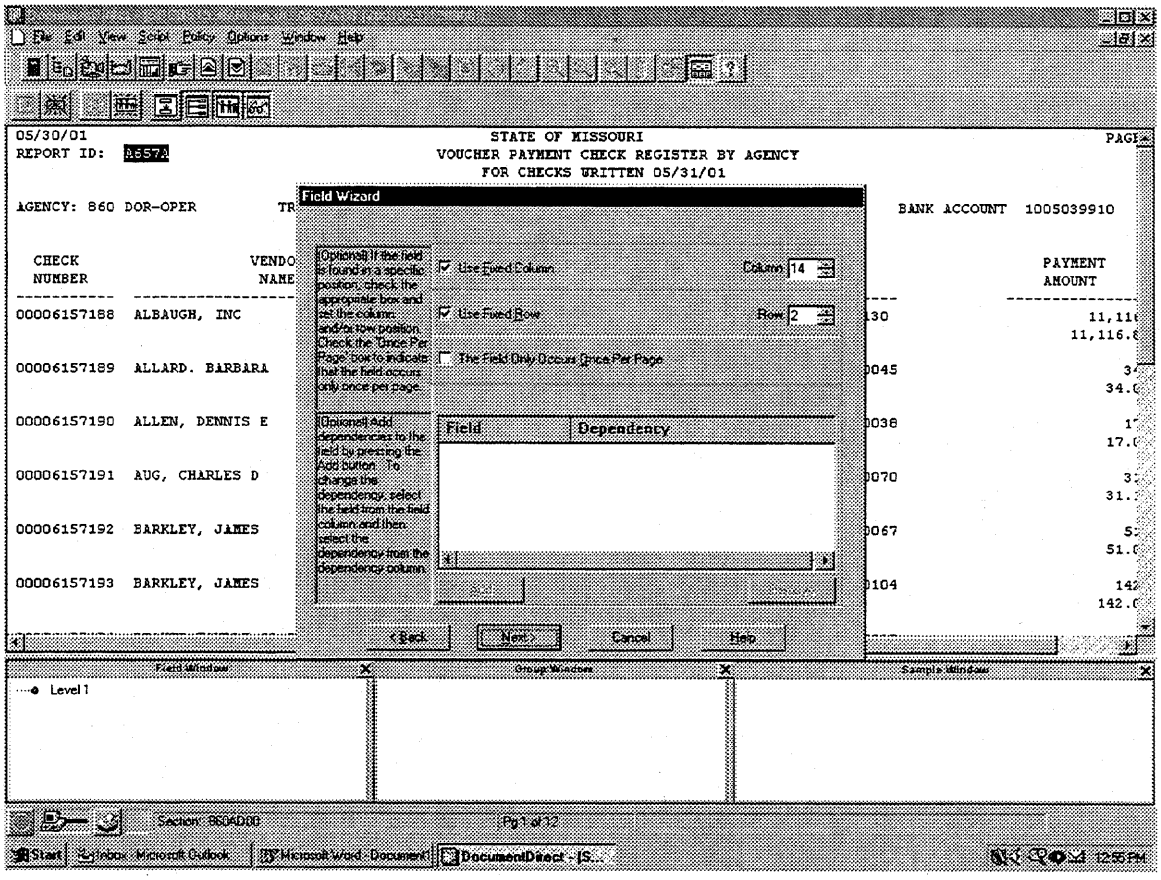
So let's begin by creating our Level 1 field. The first step to creating a field is to highlight the field in the report and click on the Add Field button on the policy toolbar. It is the second icon on the toolbar that has the ABC in red letters. When you select the Add field button you will enter a Field Wizard which will walk you through your field settings options.



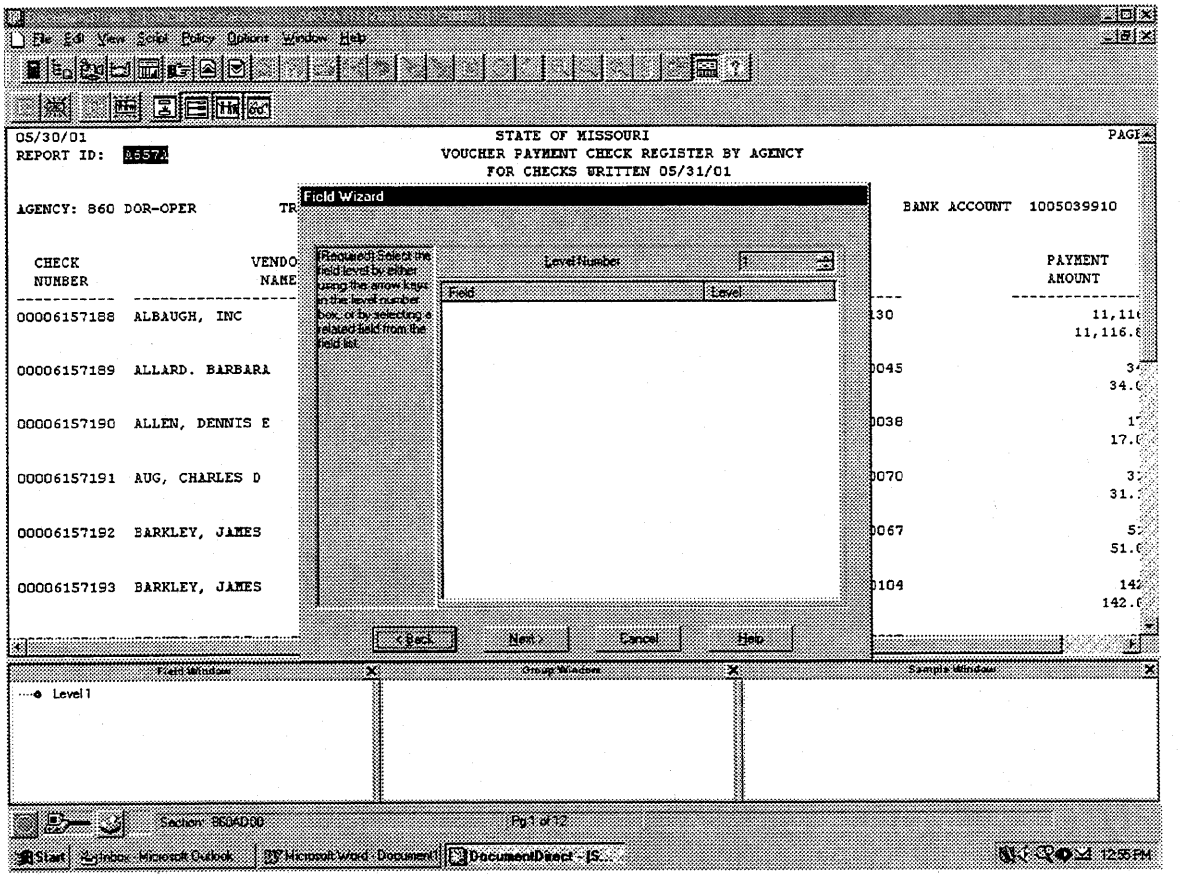
The first setting window requires you to name your field. It will not allow blank spaces. The second area asks for the Data type. Since we highlighted the width of the report name and that length will not change we can choose Fixed length text. Click on the Next button.



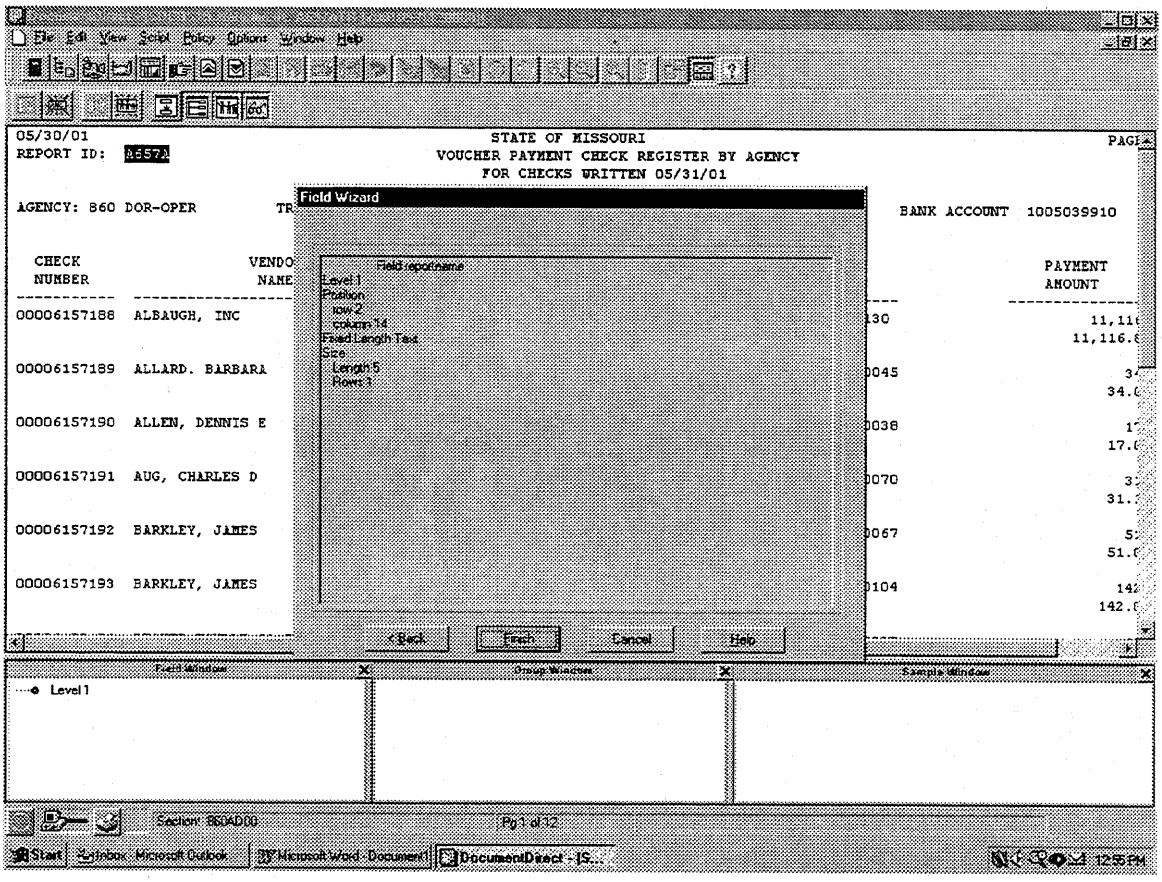
The attributes window allows you to modify the string length and increase the number of rows for you report name. No modifications are necessary so click the Next button.



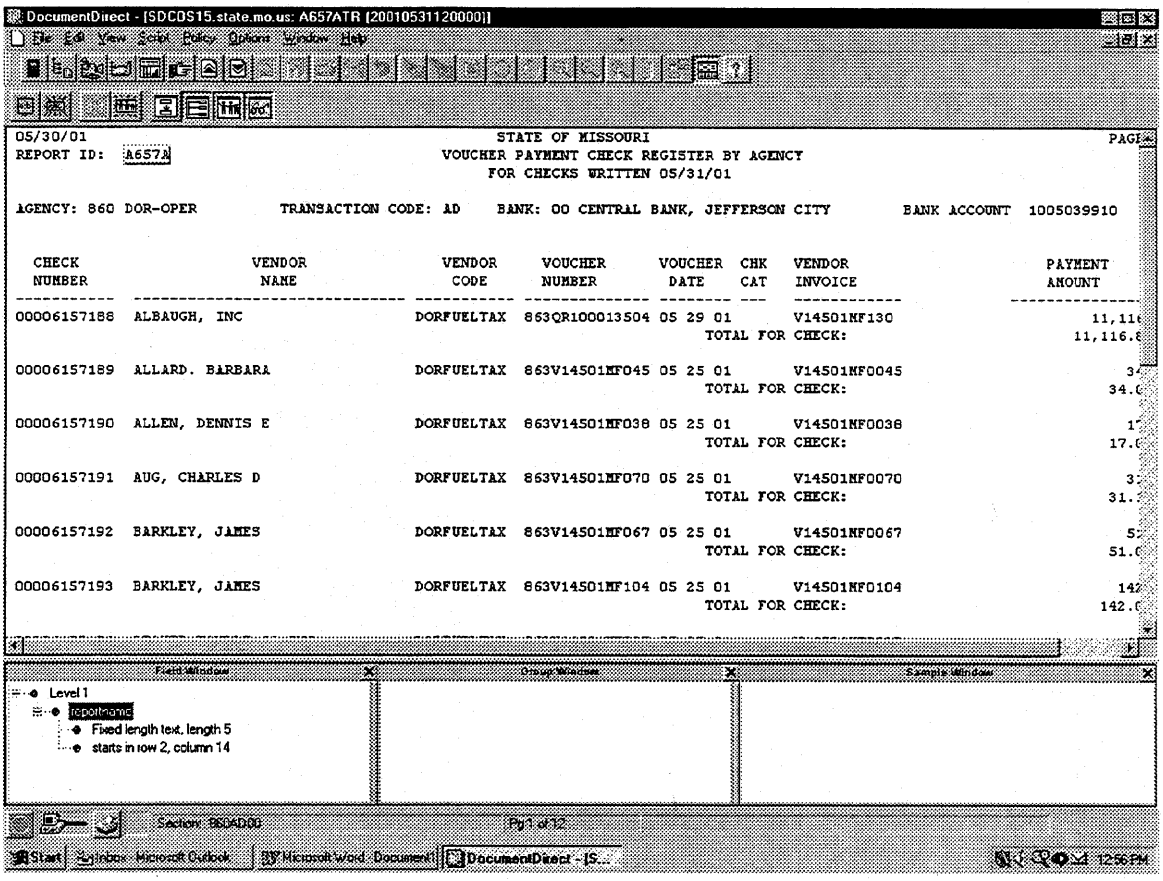
The Dependencies window asks for the location of data in the report. MOBIUS needs the location so that it pulls up the correct data. The report name is always going to be in the same column and row so check both of the fixed column and fixed row options.



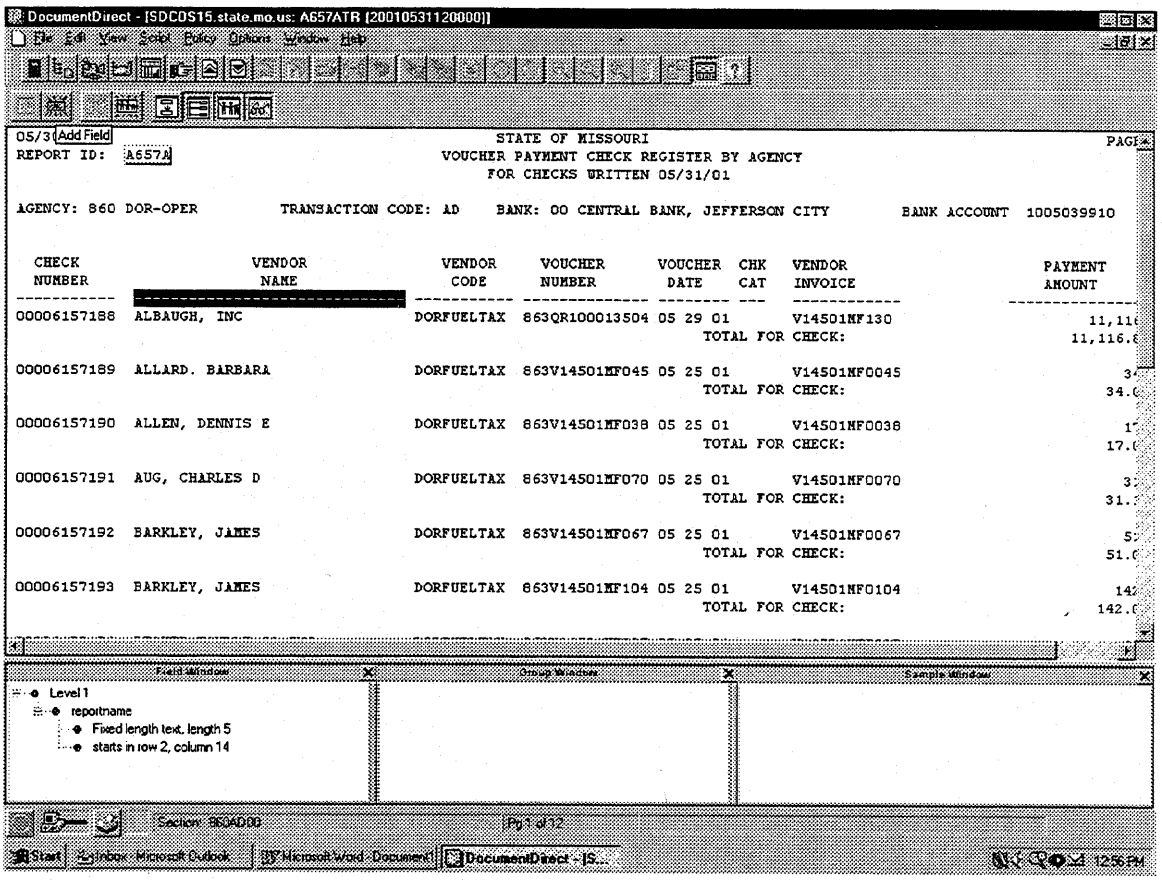
Since this is a report identifier this field is a Level 1. Click on the Next button



The summary window shows the choices have made in the previous windows. The Back button allows you to make any changes before you leave the field window. Click on the Finish button.

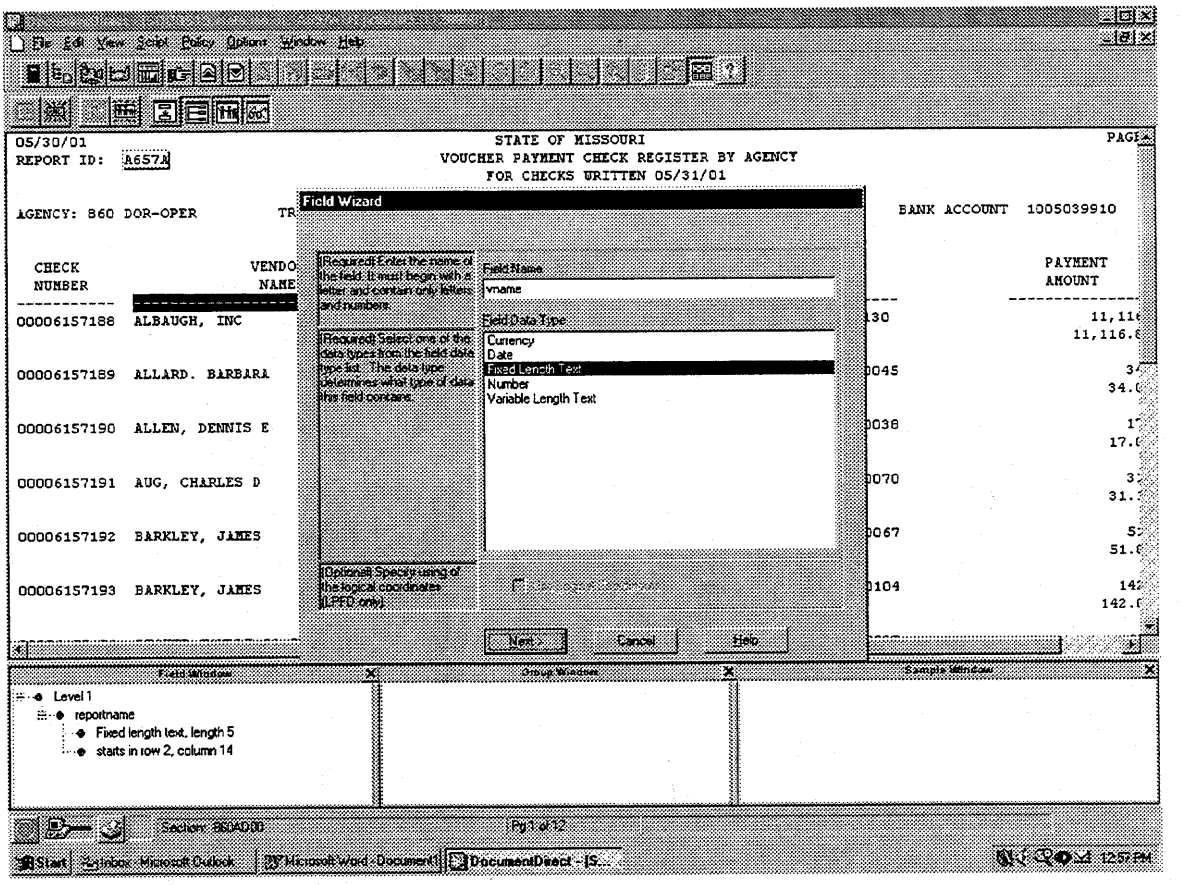


The information for the reportname field displays under Level 1 in the Field window.

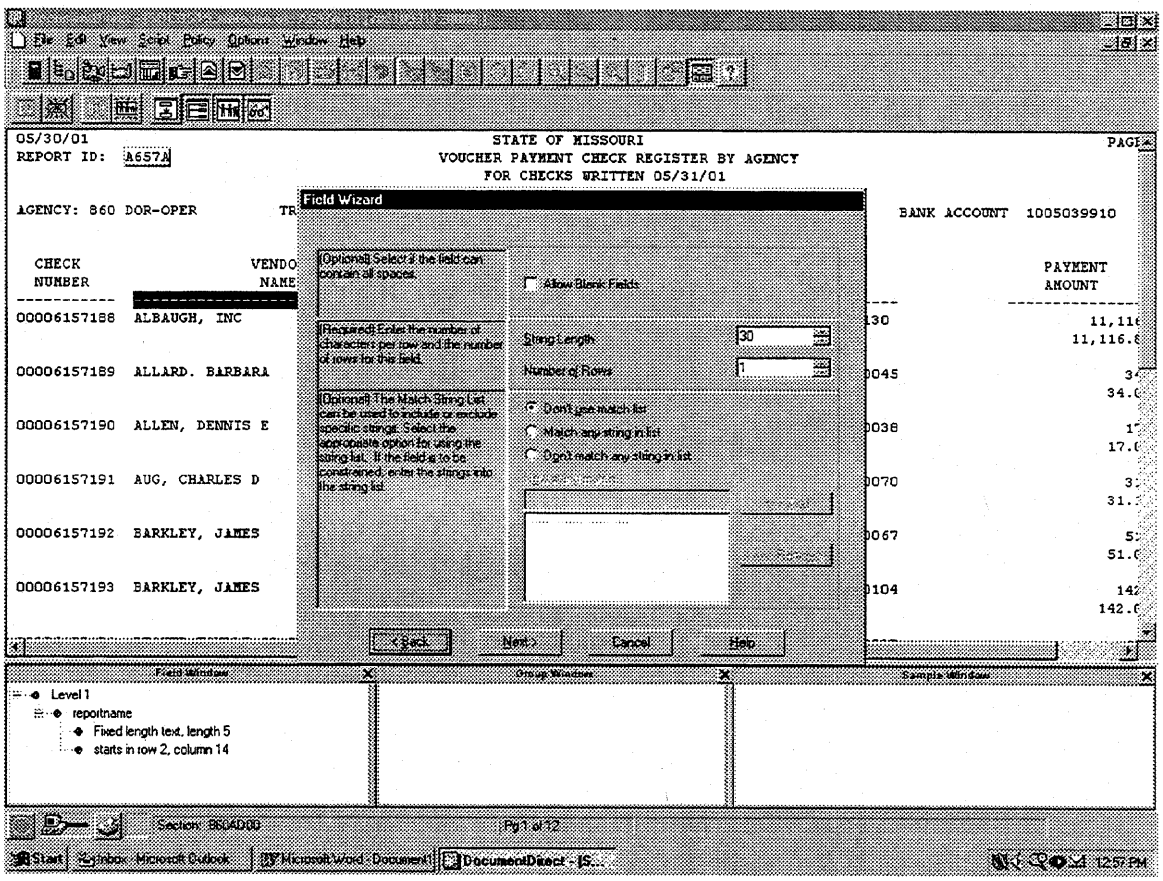


The next field that we want to create is our Vendor name level 2 field. Remember the purpose of the level 2 is to help identify where our Level 3 data can be located. The dashed line above the actual vendor name allows us to use this as an identifier.

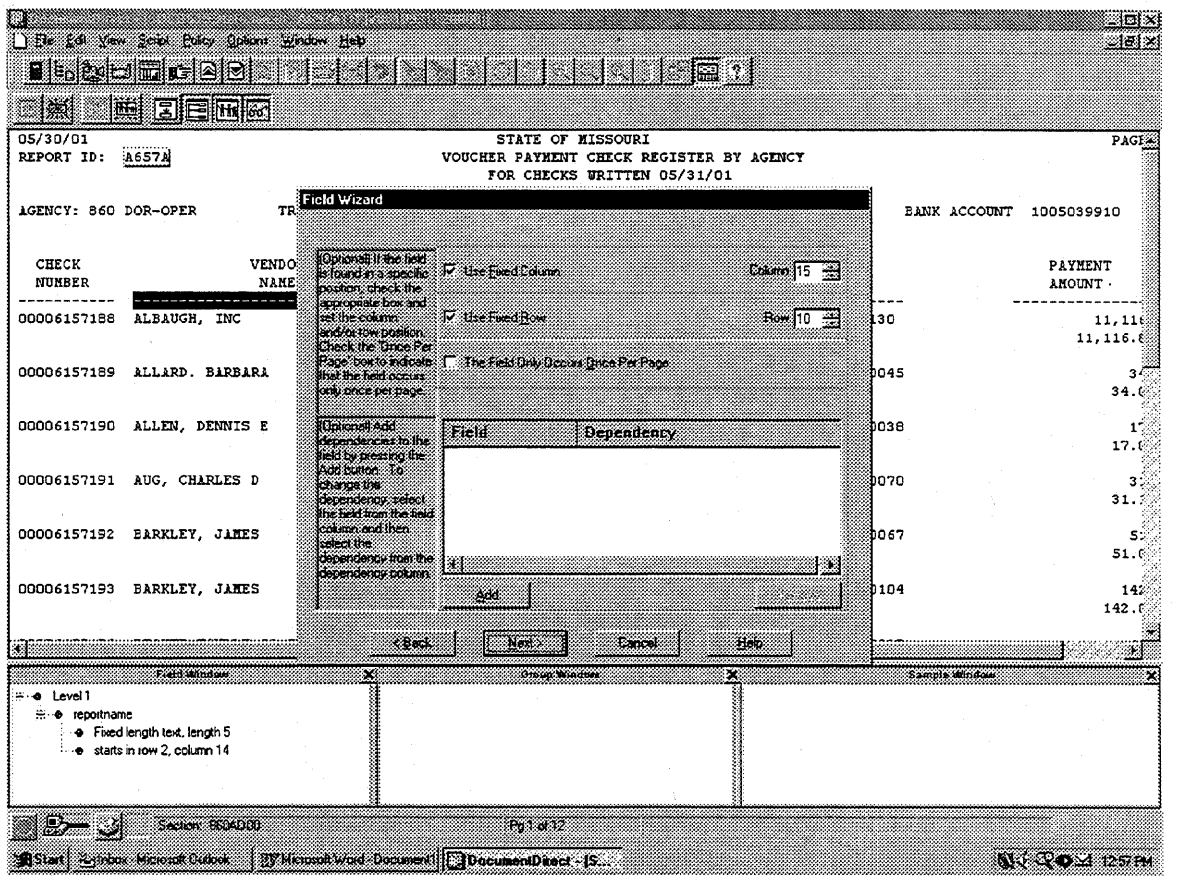
Highlight the width of the column when you mark the dashed column.



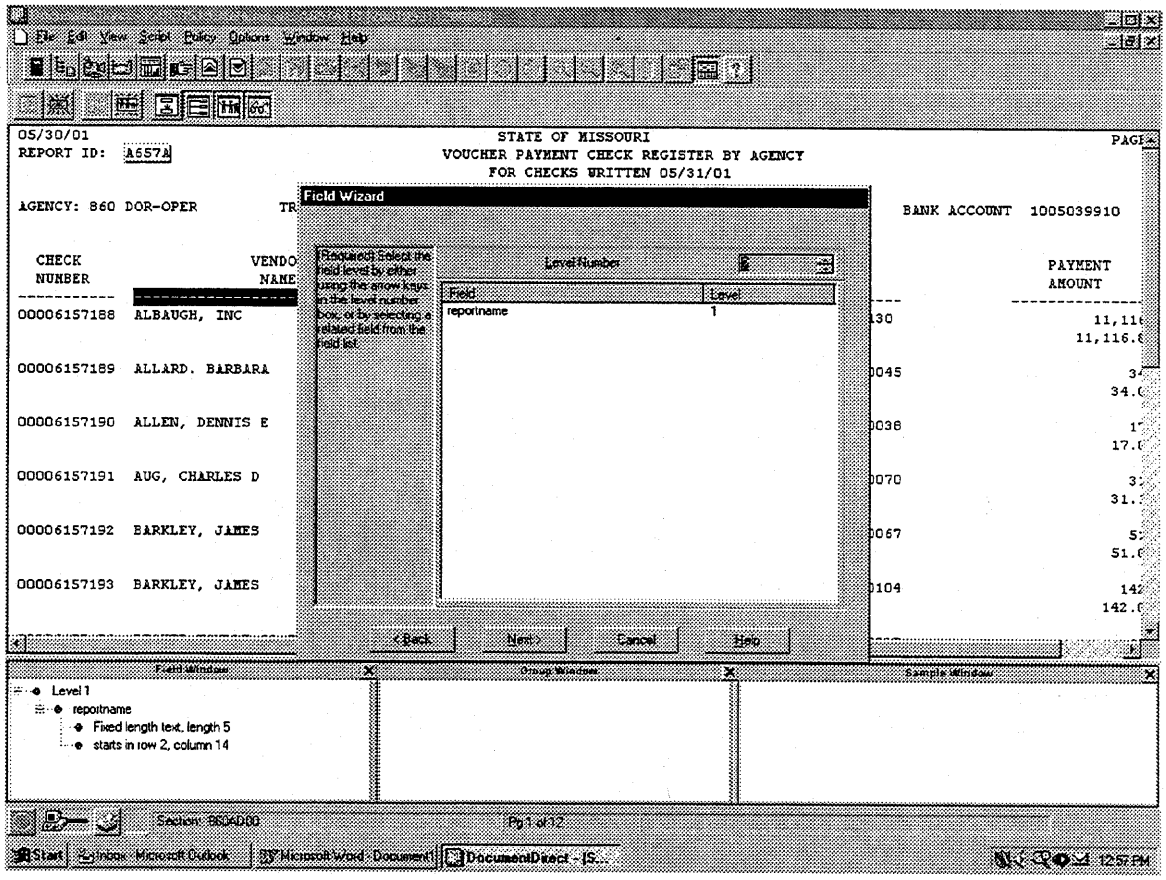
Name this field vname and since the column width was marked we can keep this field as a fixed length text. Click on the next button.



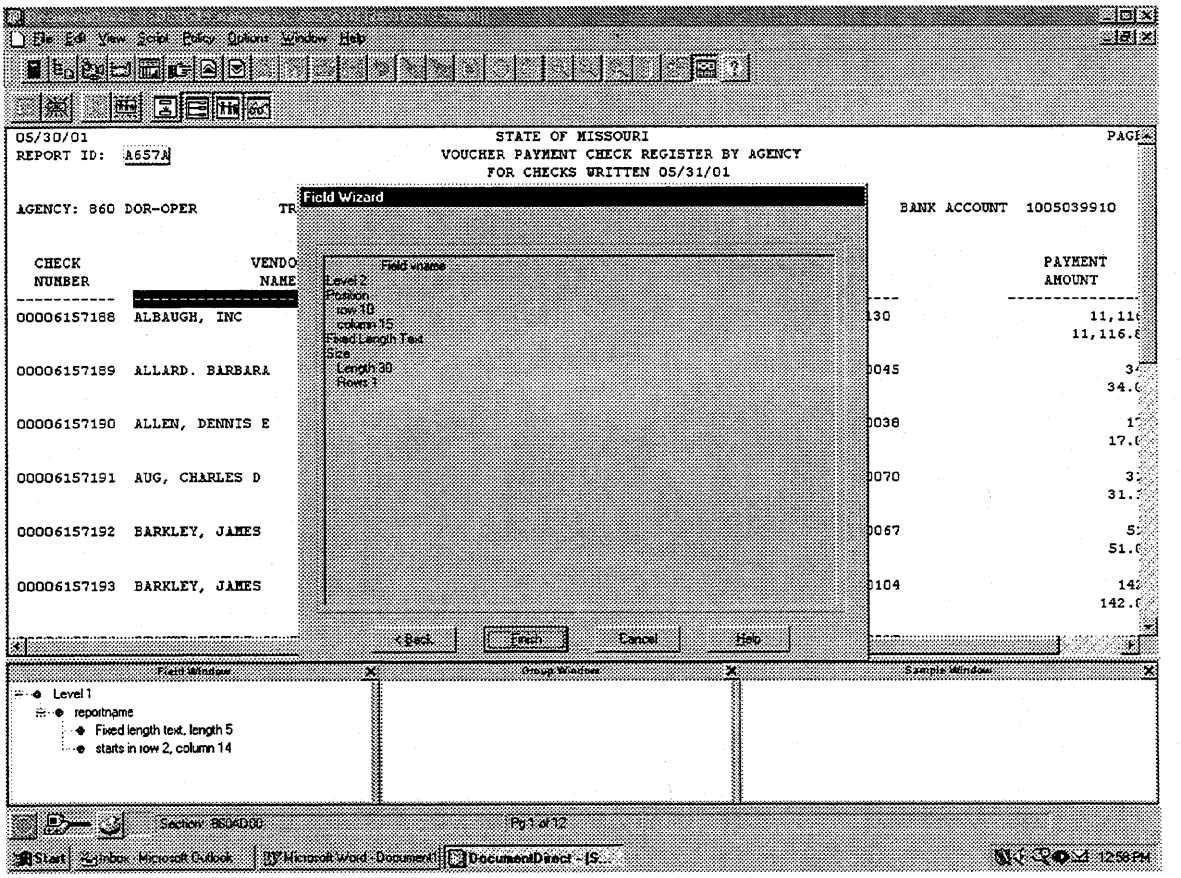
Keep the default settings for this field in the Attributes window. Click on the Next button.



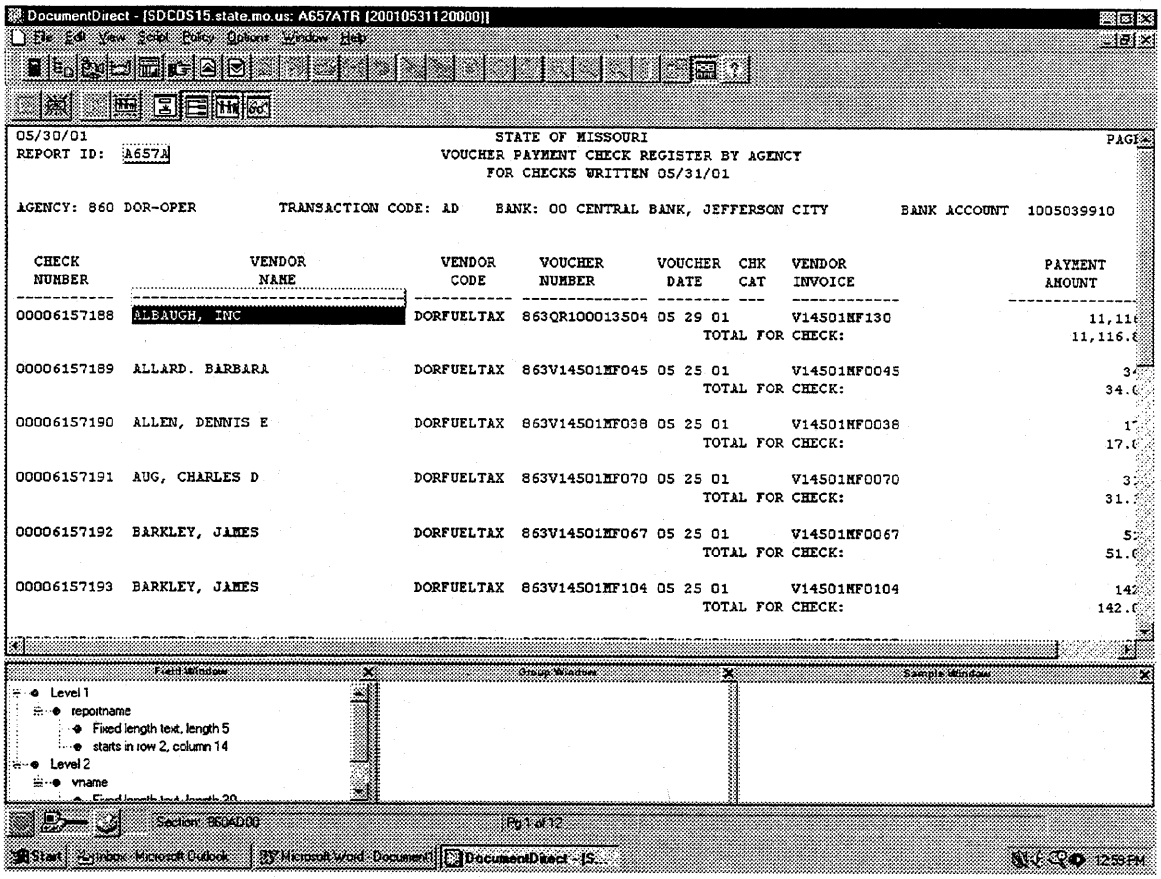
Since this field will be located in the same column and row click on both of those options. Click on the Next button.



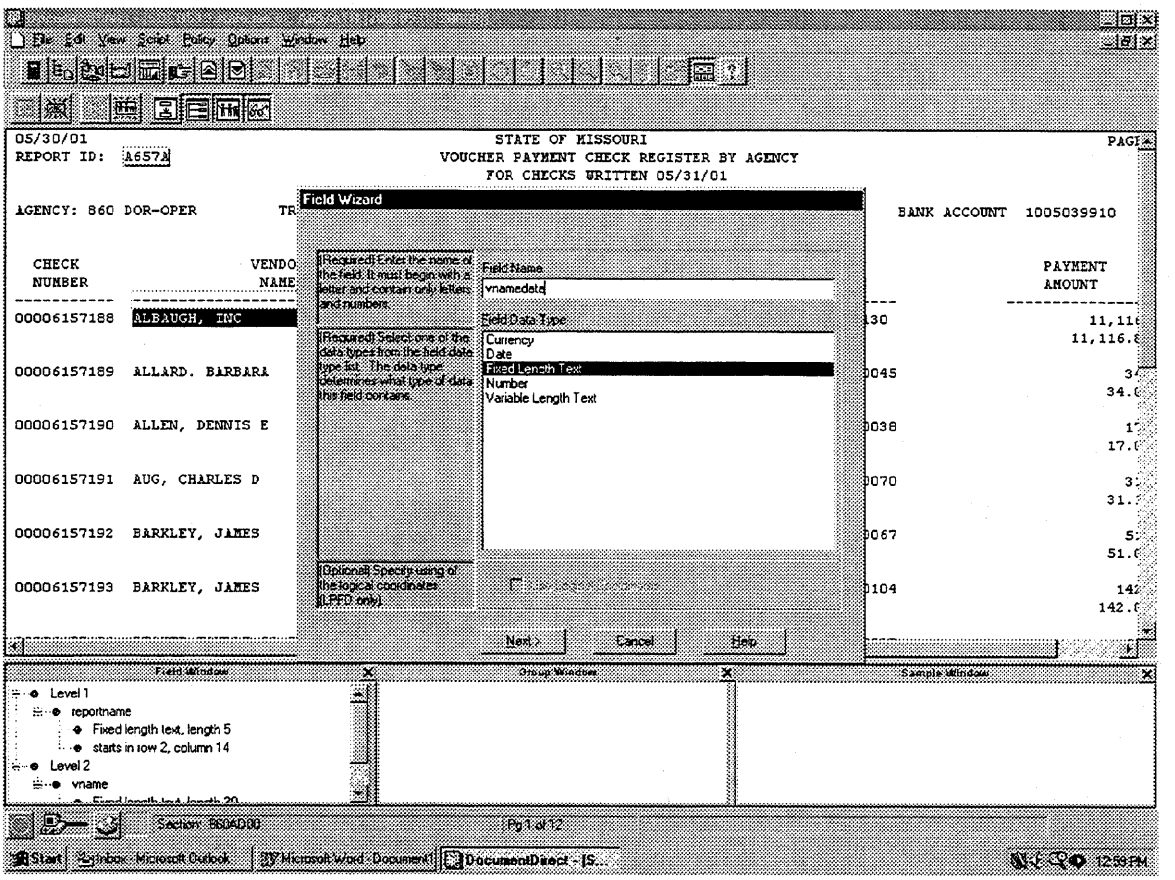
This field is going to help MOBIUS locate the actual vendor name data so this will be a level 2 field. To increase the setting to 2 you may use your mouse and click on the up arrow or use your up arrow on you're the keyboard. Click on the Next button.



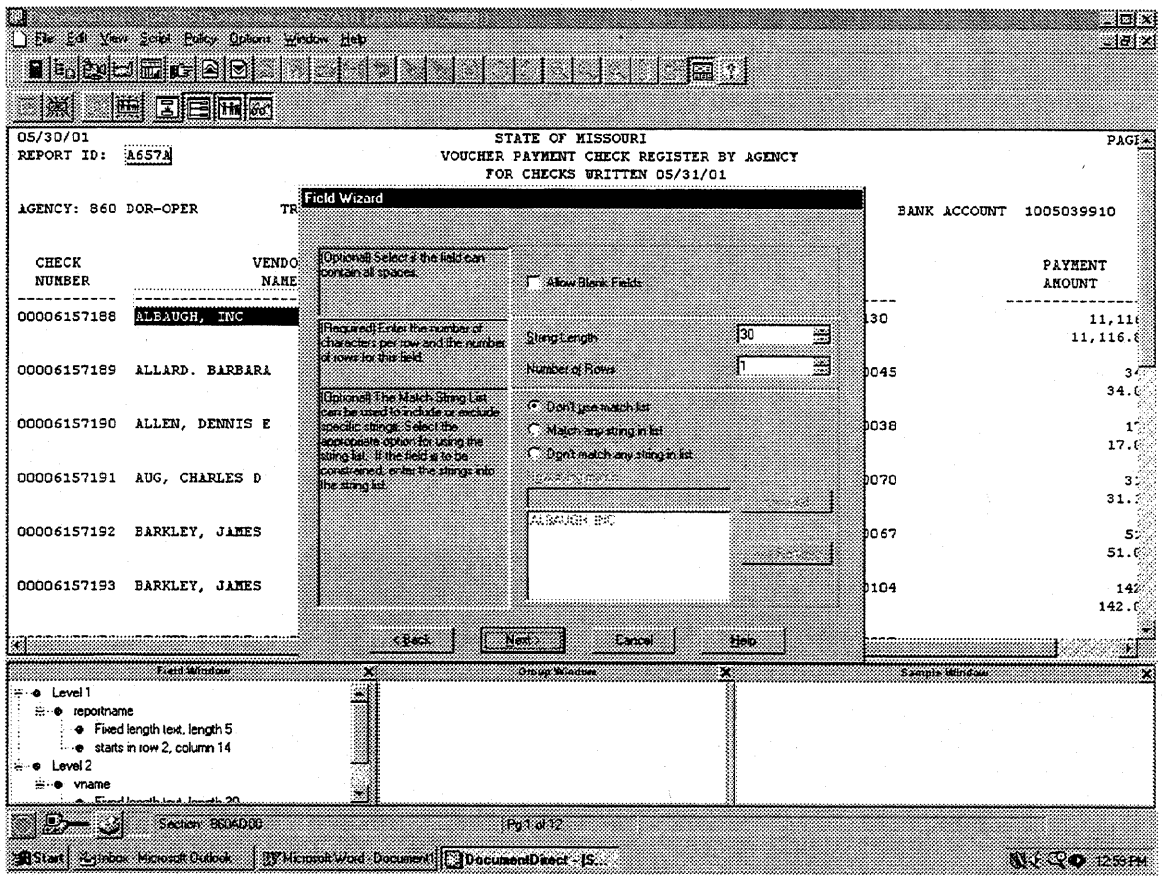
Click on the Finish button after reviewing the summary information.



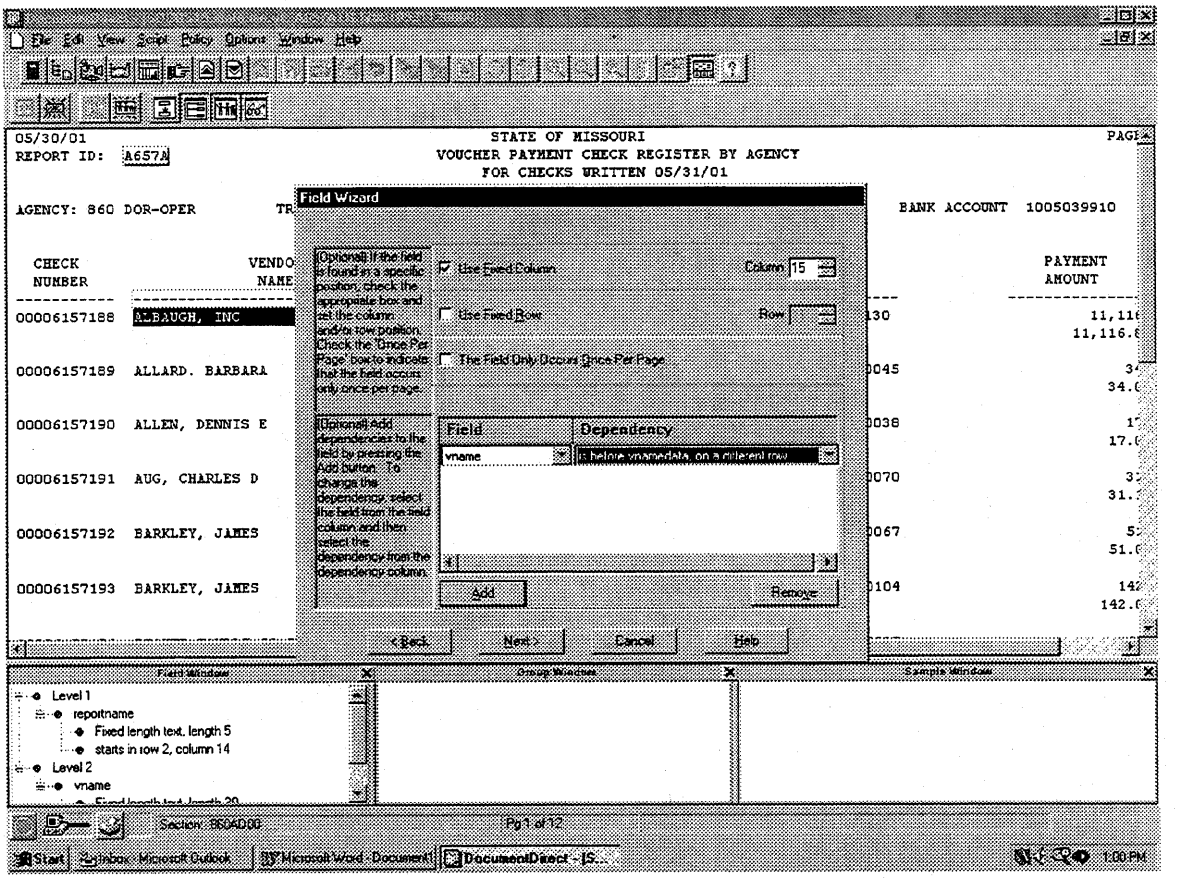
The next step will be to create the field that will display the actual vendor name data. Highlight the first vendor name marking across the column width. Click on the Add field icon on the Policy toolbar.



Name this field vnamedata. The width of the column was marked so we can choose fixed length text as our data type. Click on the Next button.

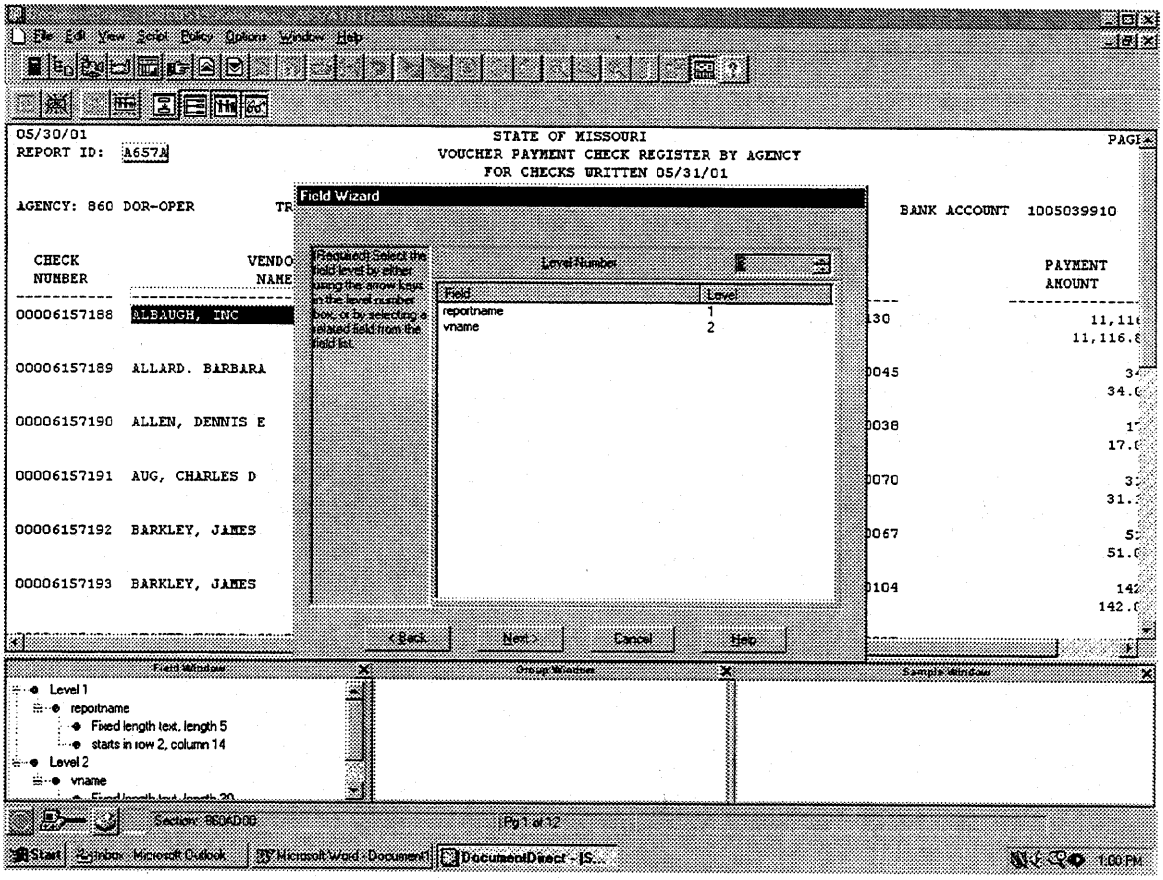


No changes are necessary to the Attributes window. Click the Next button.

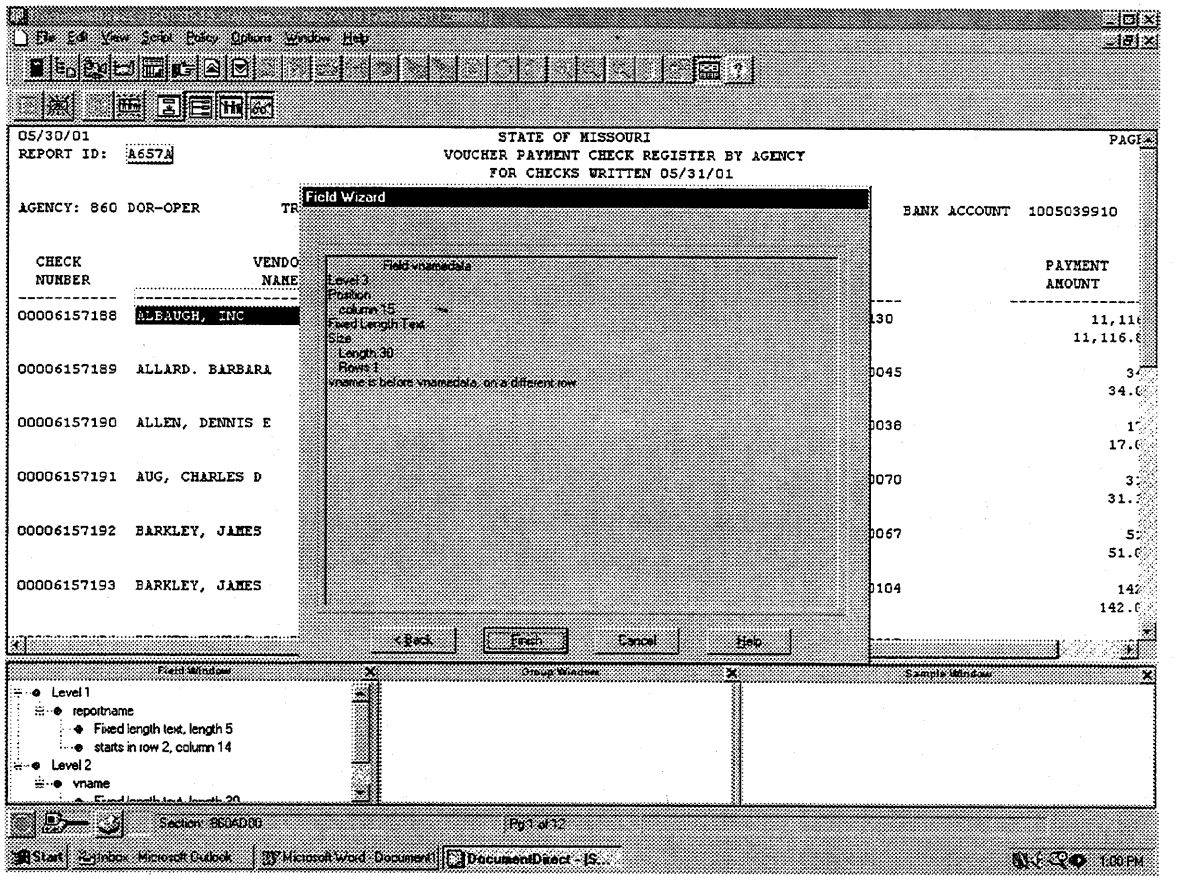


Choose Fixed column so that MOBIUS knows the information will be located in column 15 each time. If fixed row is selected that would only display the data in that one fixed row so do not choose fixed row.

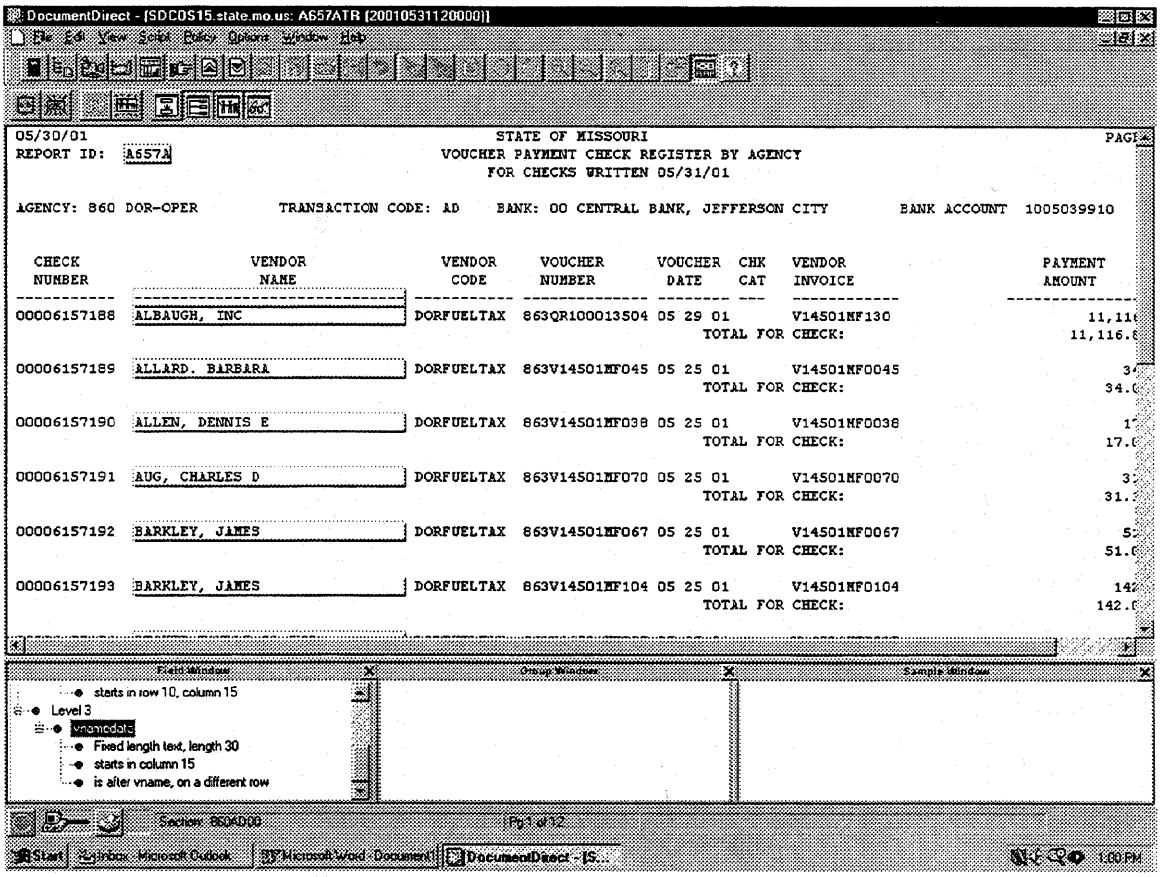
We want to establish a relationship between the vendor name data and the level 2 field for this data. To add a dependency click on the Add button and then click on the dash that appears under Field. From the drop down you want to choose the level 2 field which we named vname. The dependency is that vname is before vnamedata on a different row. The dependency will allow MOBIUS to locate this level 3 information by looking for the Level 2 before the Level 3 in the same column but on a different row, in this example the row above the actual data. Click on the Next button.



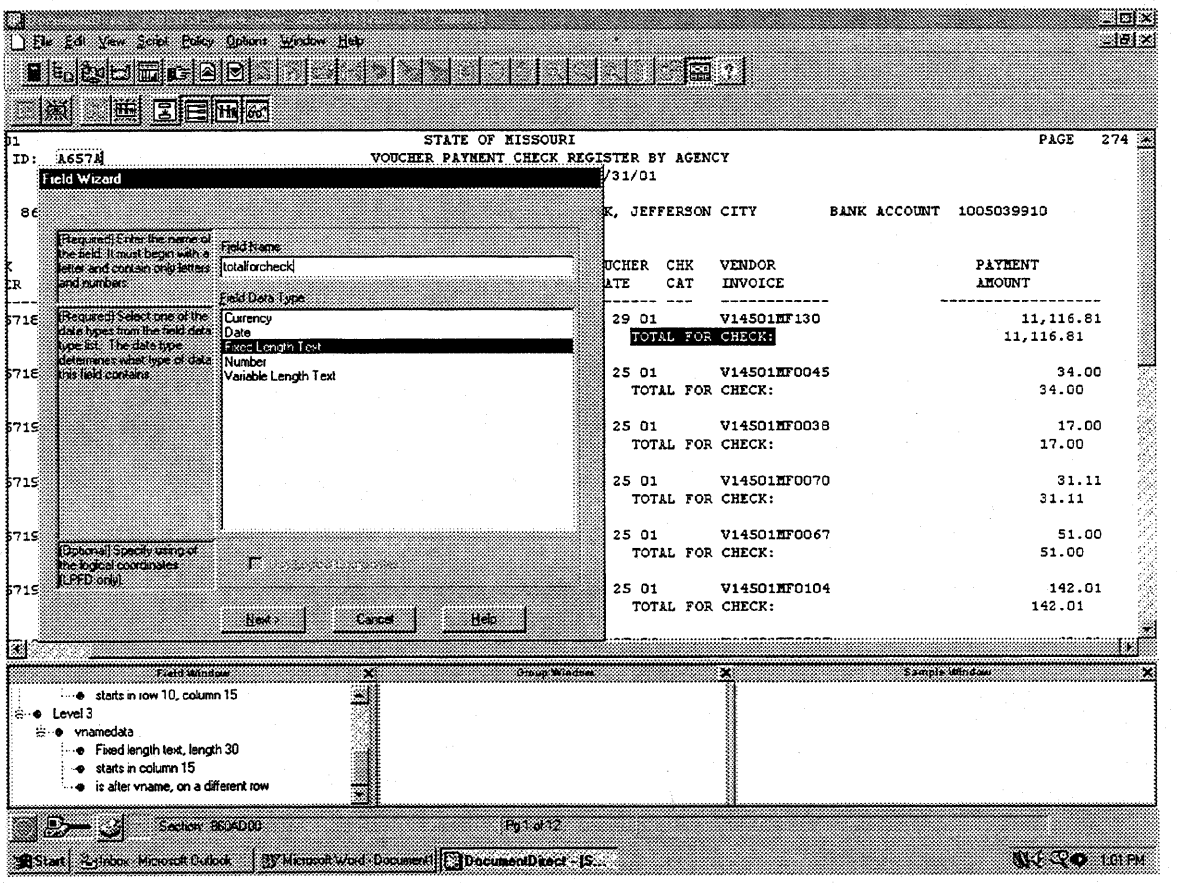
This is a data field so we need to make this a level 3. Click on the Next button.



Review the summary information and click on the Finish button.

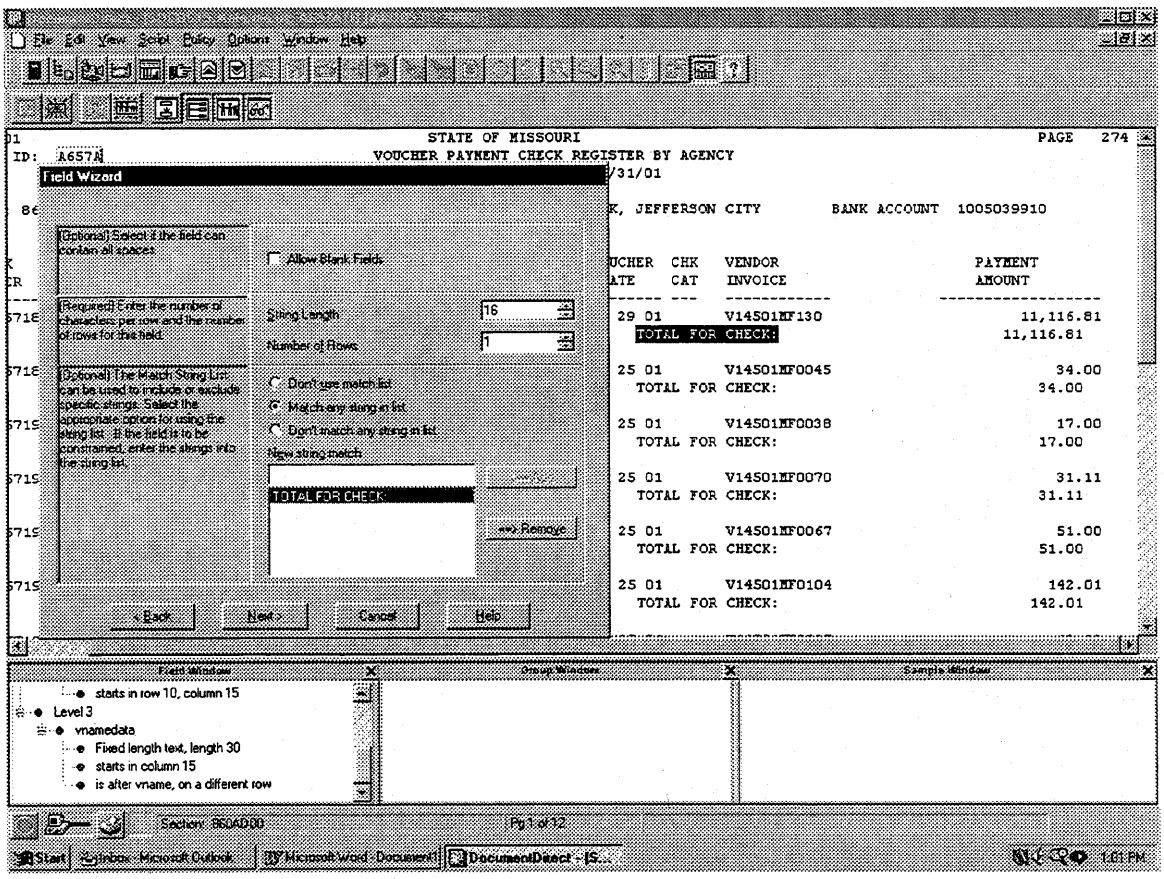


Upon completing the level 3 all the vendor names are outlined with the box. This allows you to see what MOBIUS considers to be the data information under the vnamedata level 3.

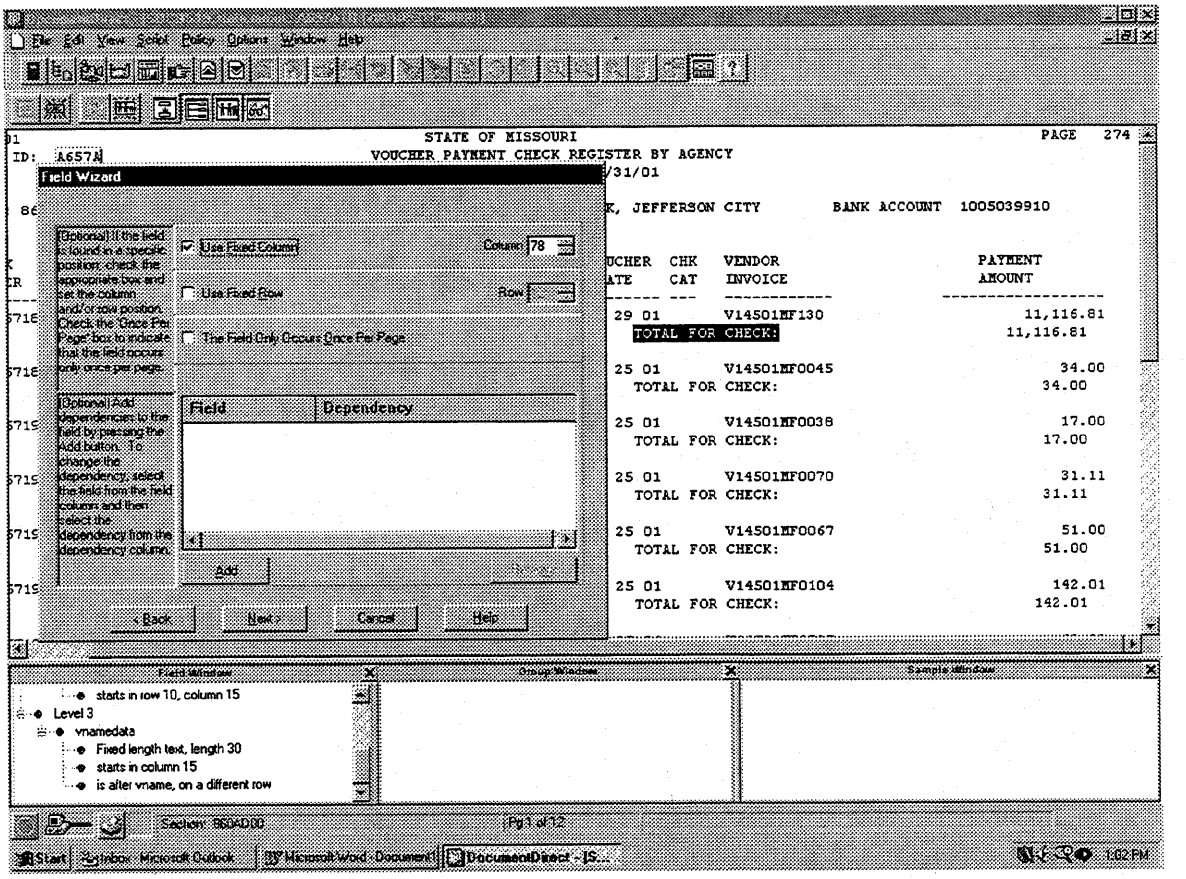


The next field to be created is the Level 2 for the Payment amount data. Highlight the first example of TOTAL FOR CHECK: and click on the Add Field button.

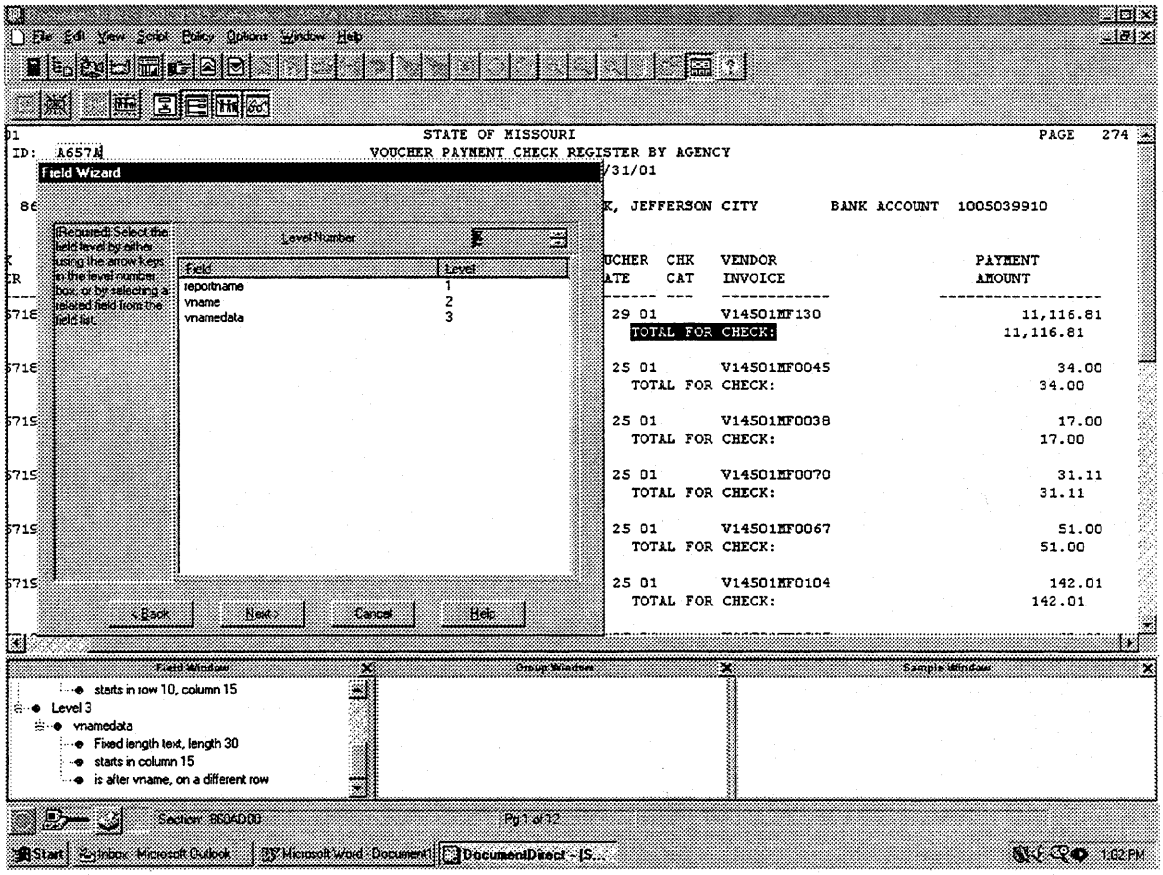
The field name will be totalforcheck and it will be a fixed length text. Click on the Next button.



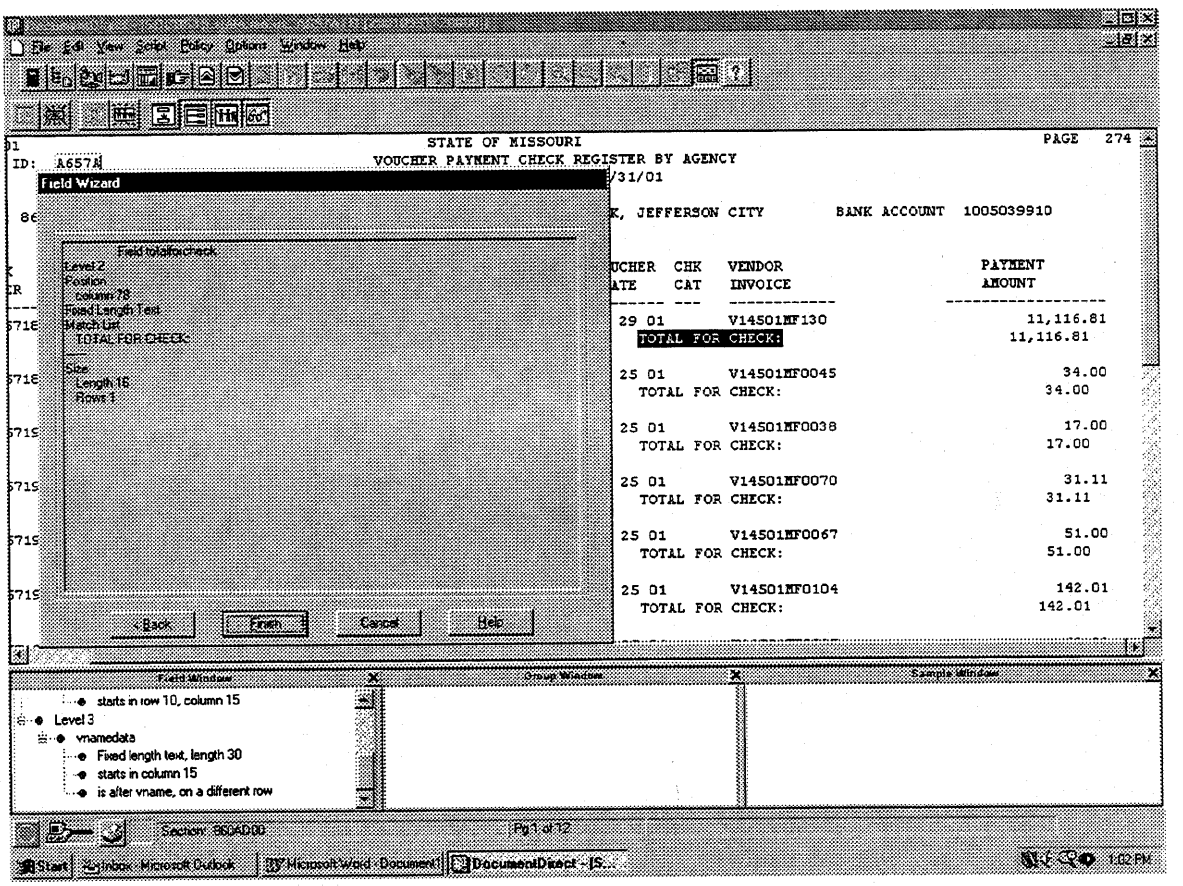
This field does not have a fixed row so we want MOBIUS to match the text string. Click on the Match any string in list radio button and then click on TOTAL FOR CHECK: in the string match below. Click on the Next button.



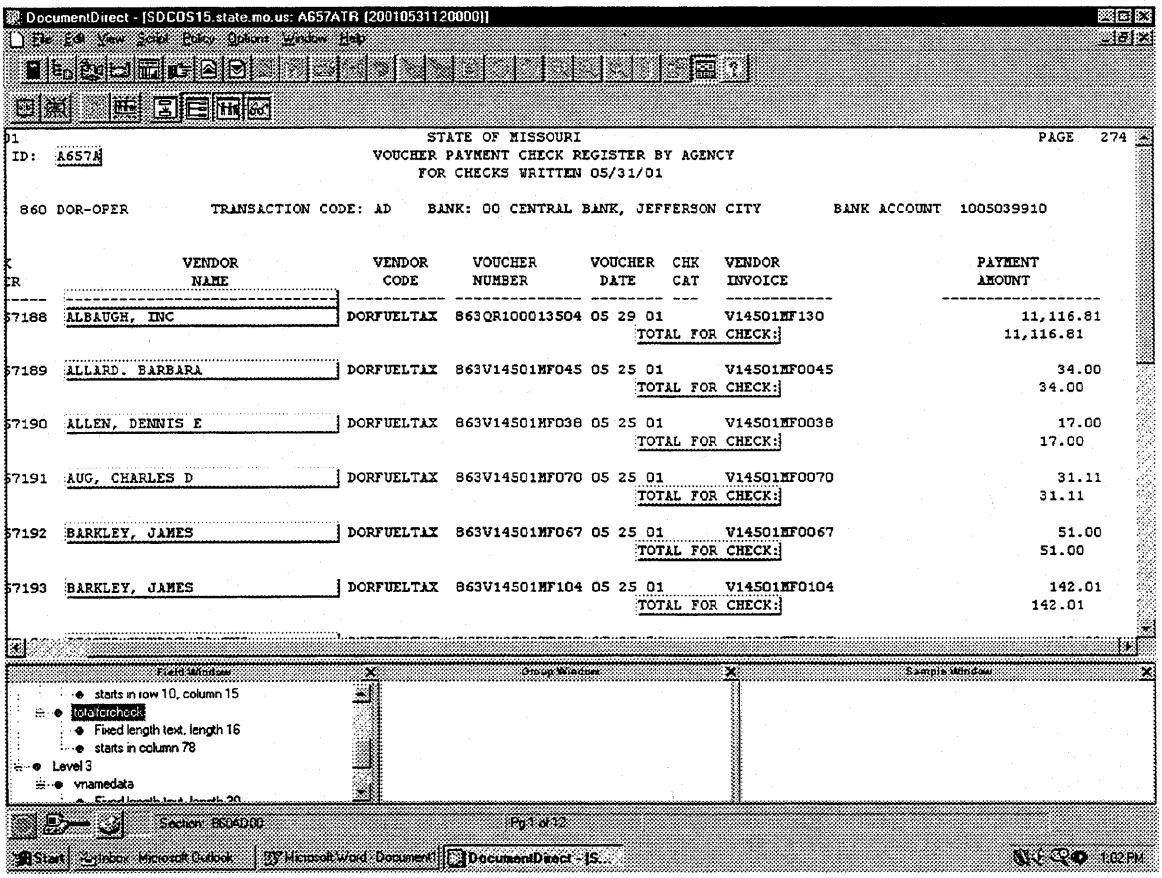
This field has a fixed column so click on the Use Fixed Column option and click the Next button.



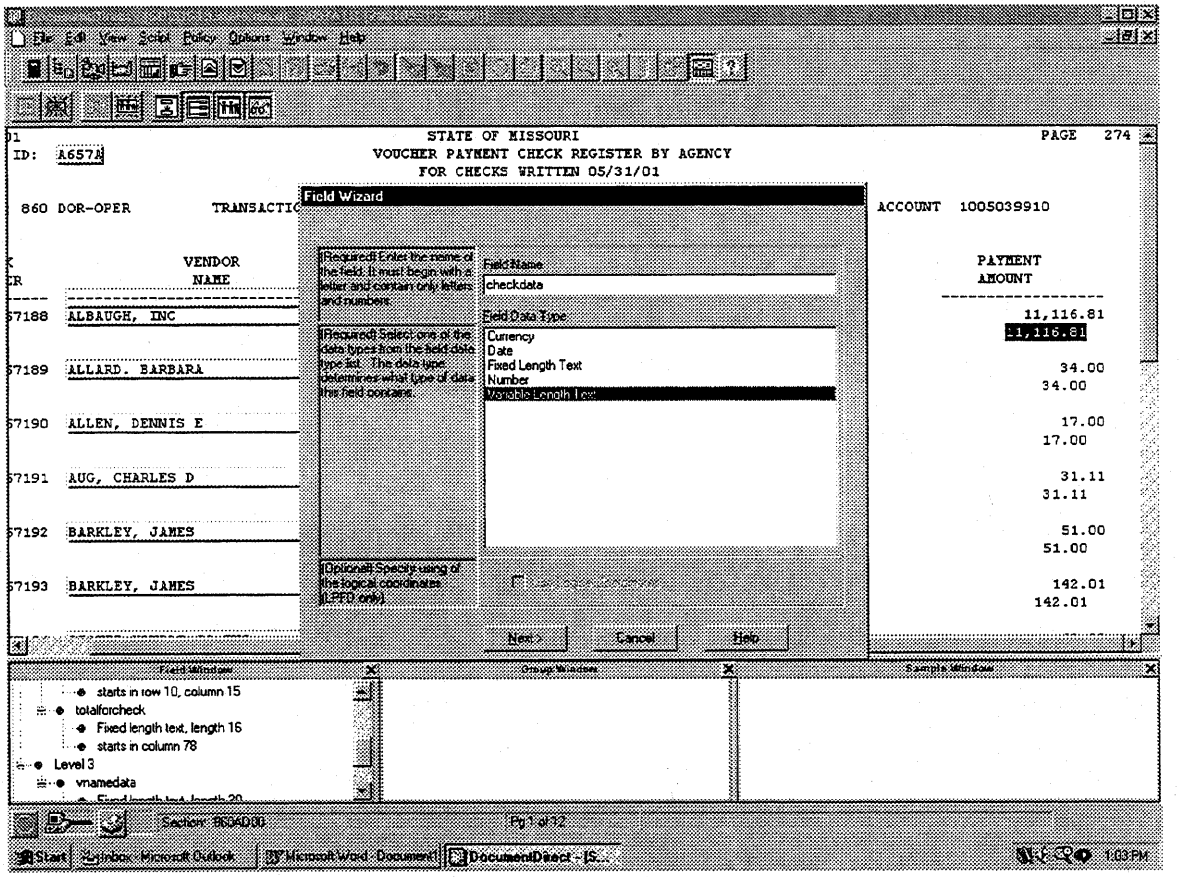
This field will be used to locate the actual payment amount data so make this a level 2. Click the Next button.



Review the summary and click Finish.

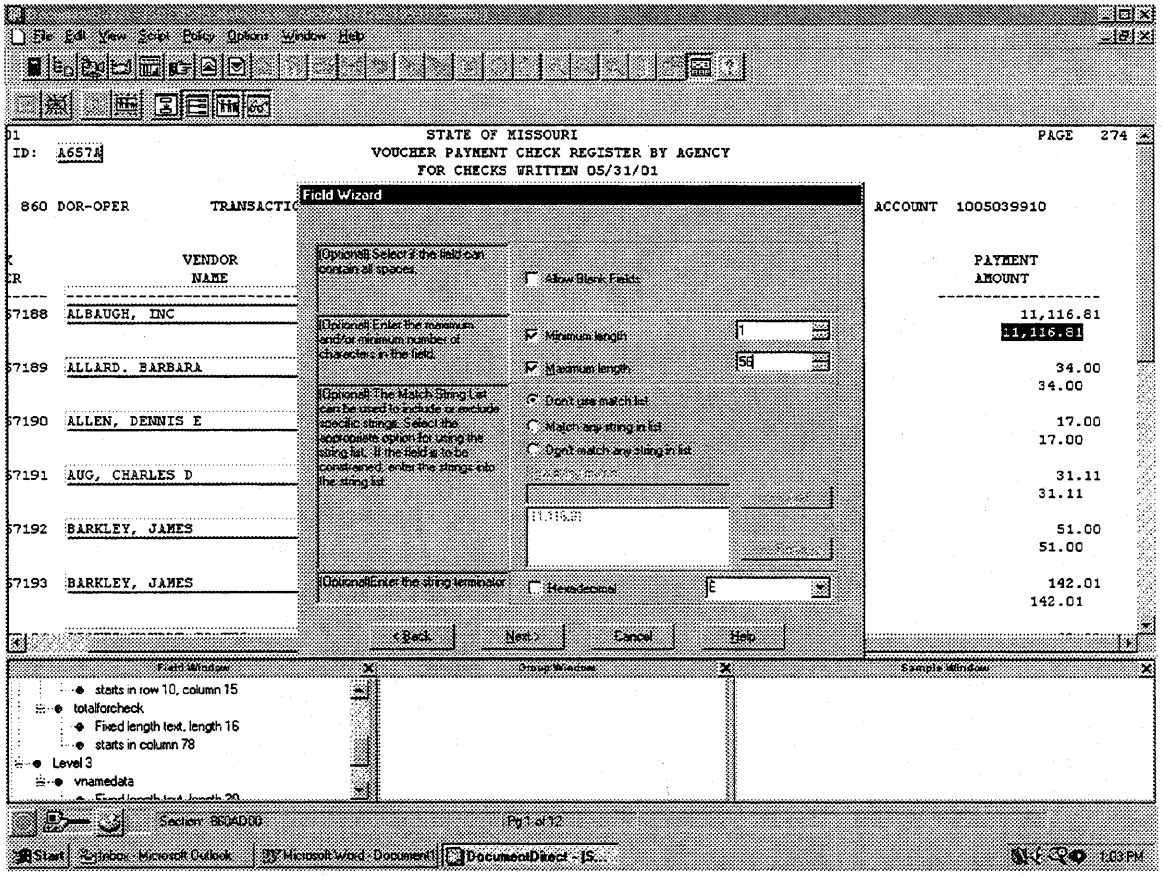


Notice all examples of TOTAL FOR CHECK: are selected.

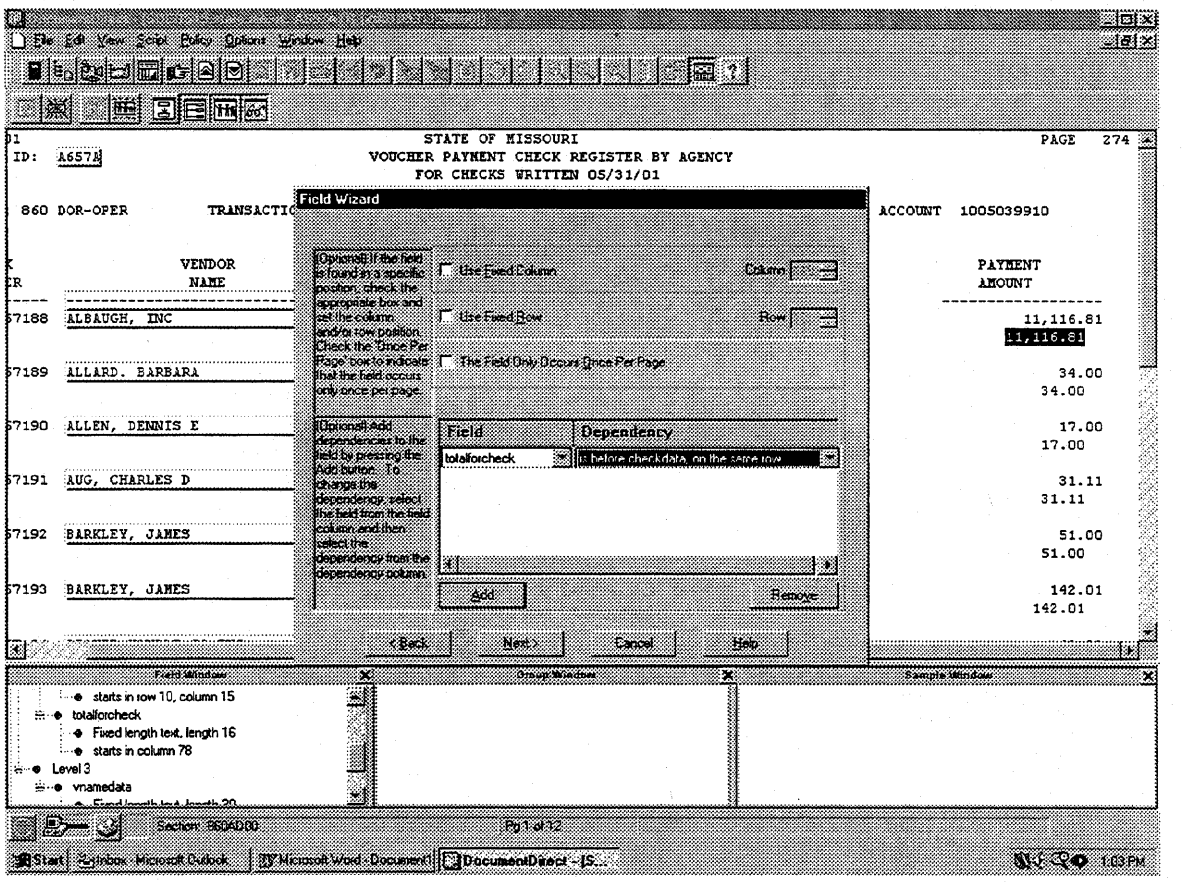


The last field to create is the actual payment amount for the each check. Mark the first example of the payment amount and click on the Add Field button.

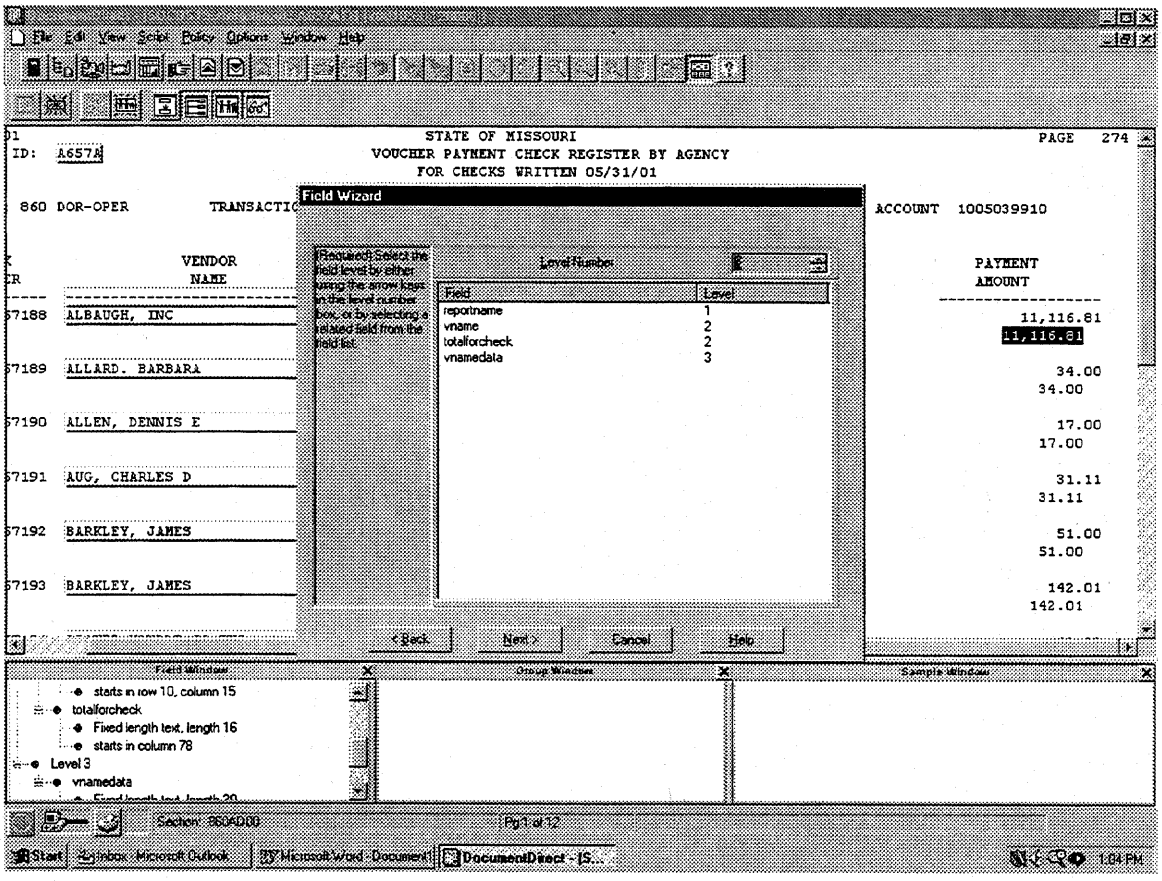
The field name is checkdata and since the values will vary in length choose Variable Length Text. Click on the Next button.



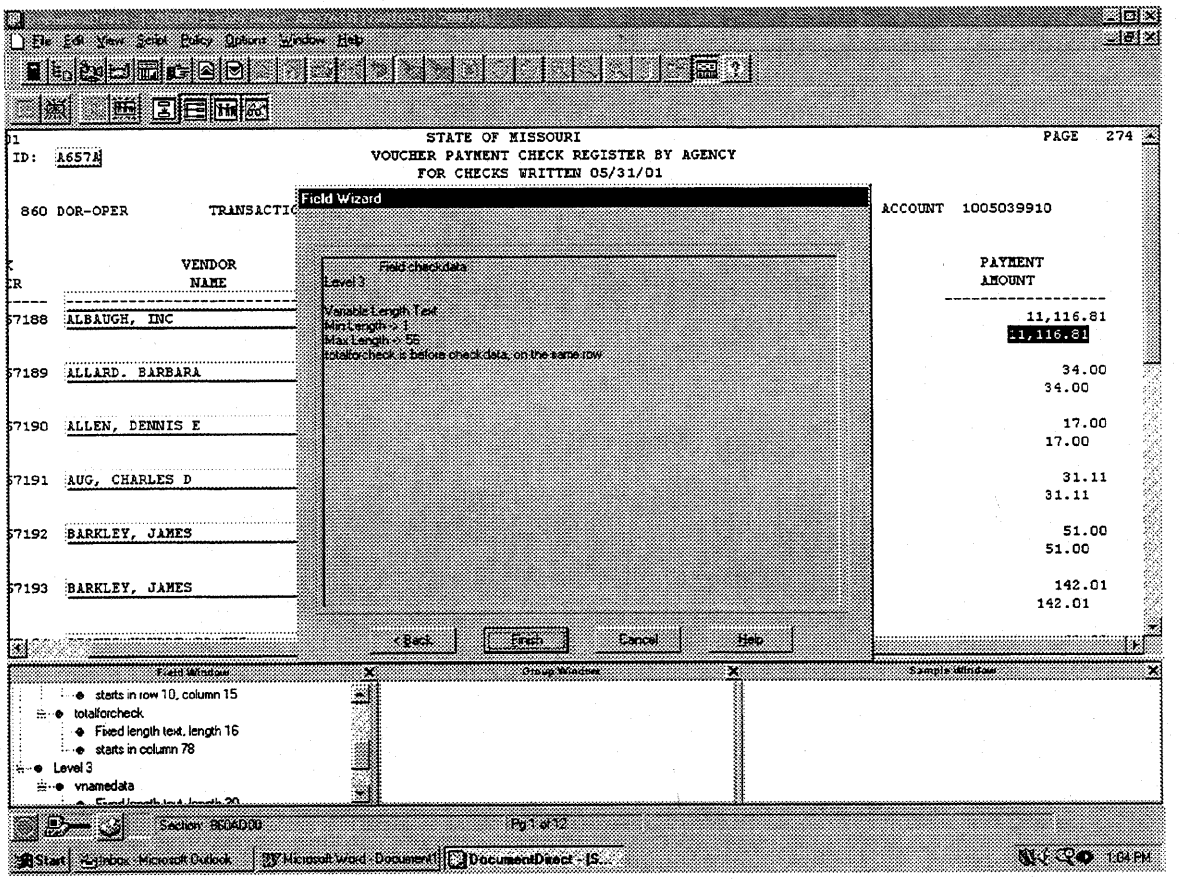
If the data type is a Variable Length Text set a minimum and maximum length. The minimum will be 1 and the maximum will be 56. Click on the Next button.



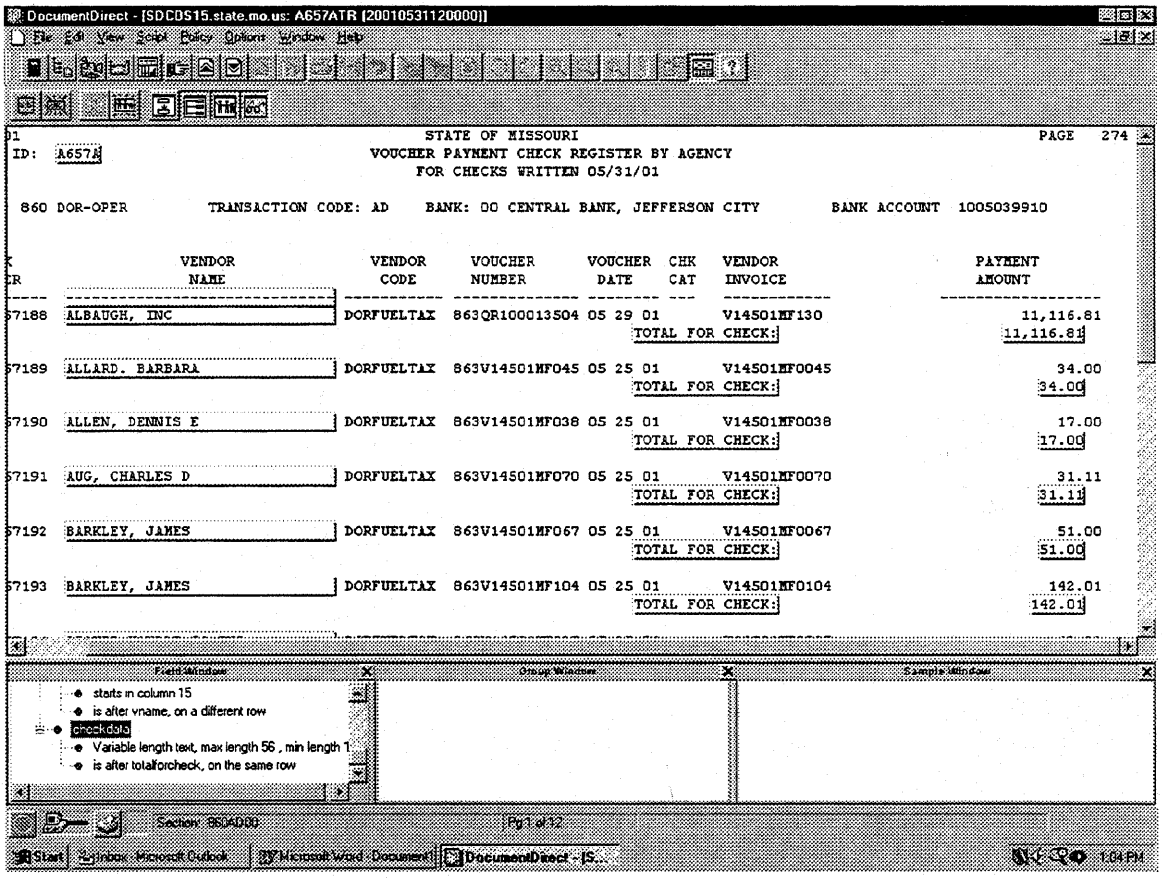
The values are not in a fixed column or row so a dependency must be set in relation to the level 3 field totalforcheck. Click on the Add button and then click on the dash under Field. The dependency should be totalforcheck is before checkdata on the same row. MOBIUS will then look for totalforcheck before the data field. Click on the Next button.



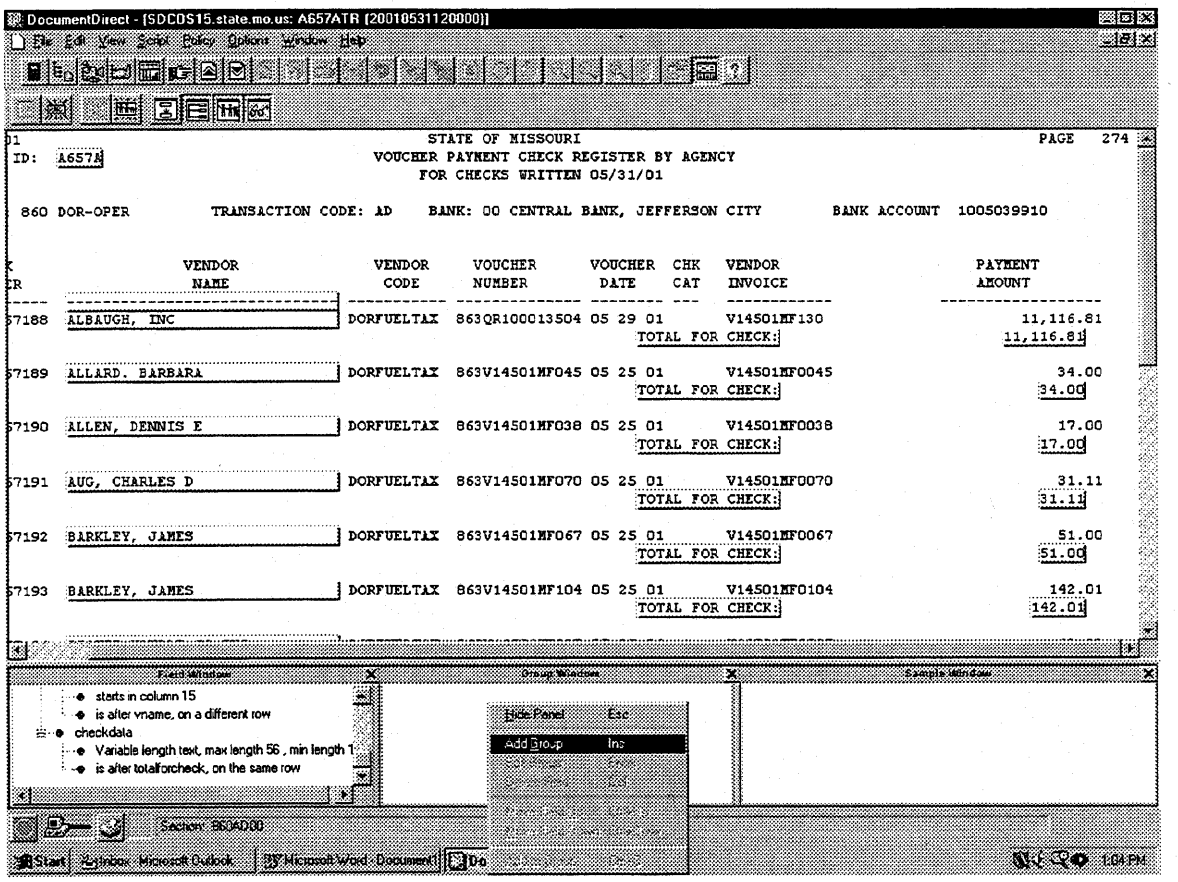
This is a data field so choose level 3. Click on the Next button.



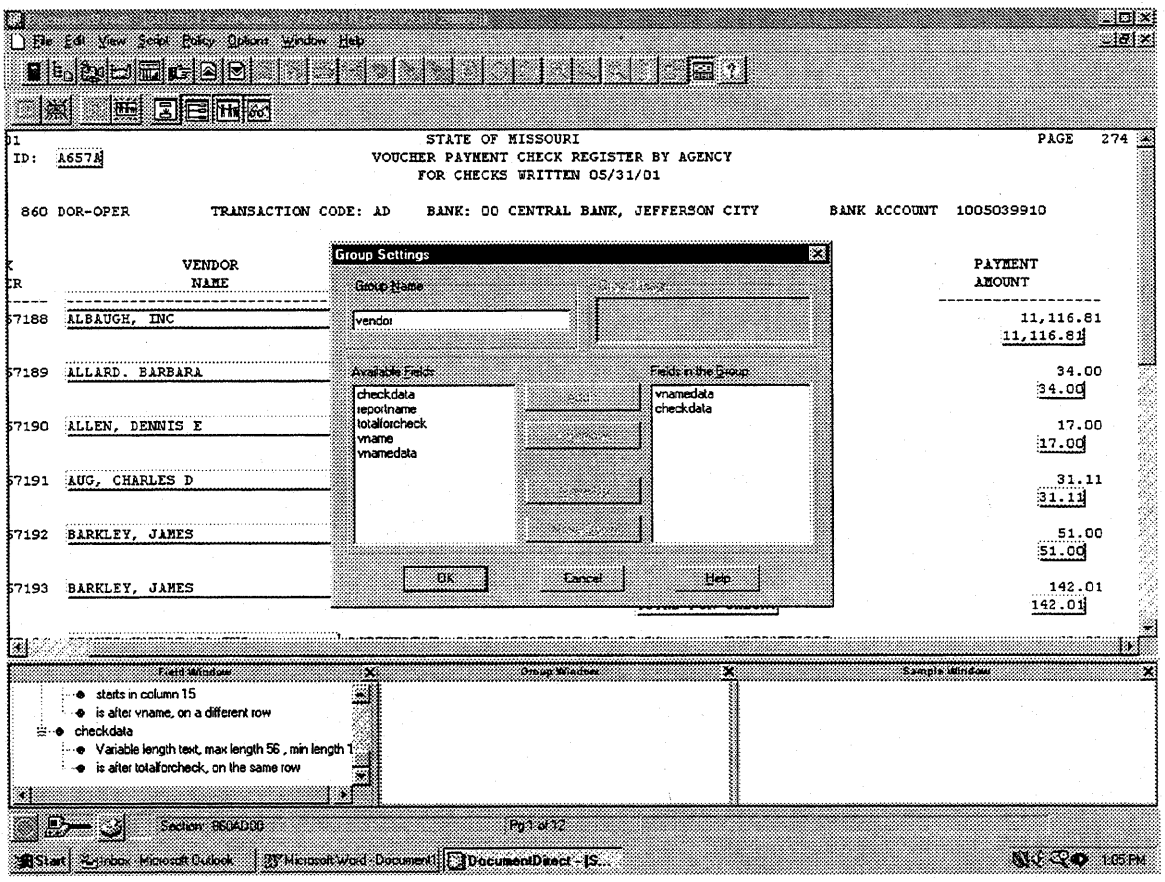
Review the summary and click Finish.



The data for each Payment Amount is now selected.

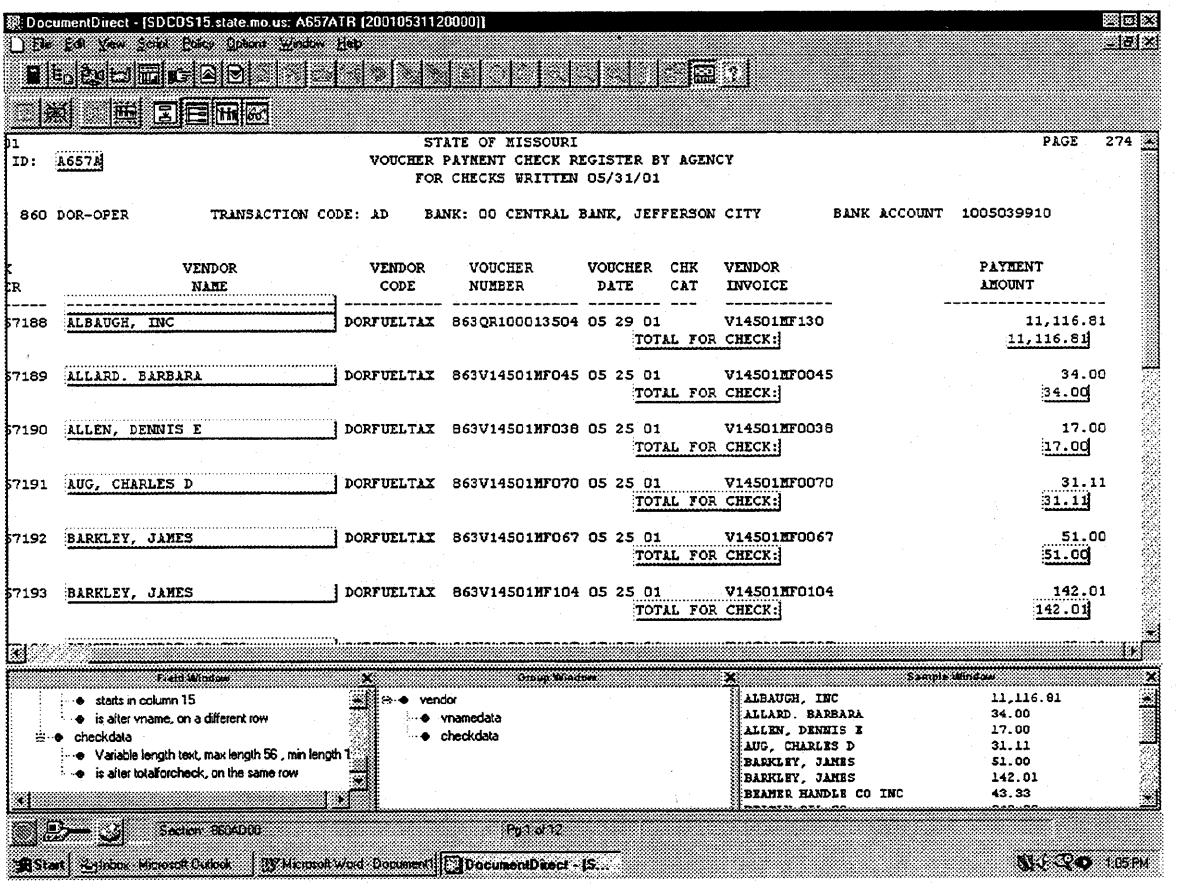


The fields for the policy have now been created. The next step is to combine the fields to be exported into a Group. Right click in the Group Window and choose Add Group.

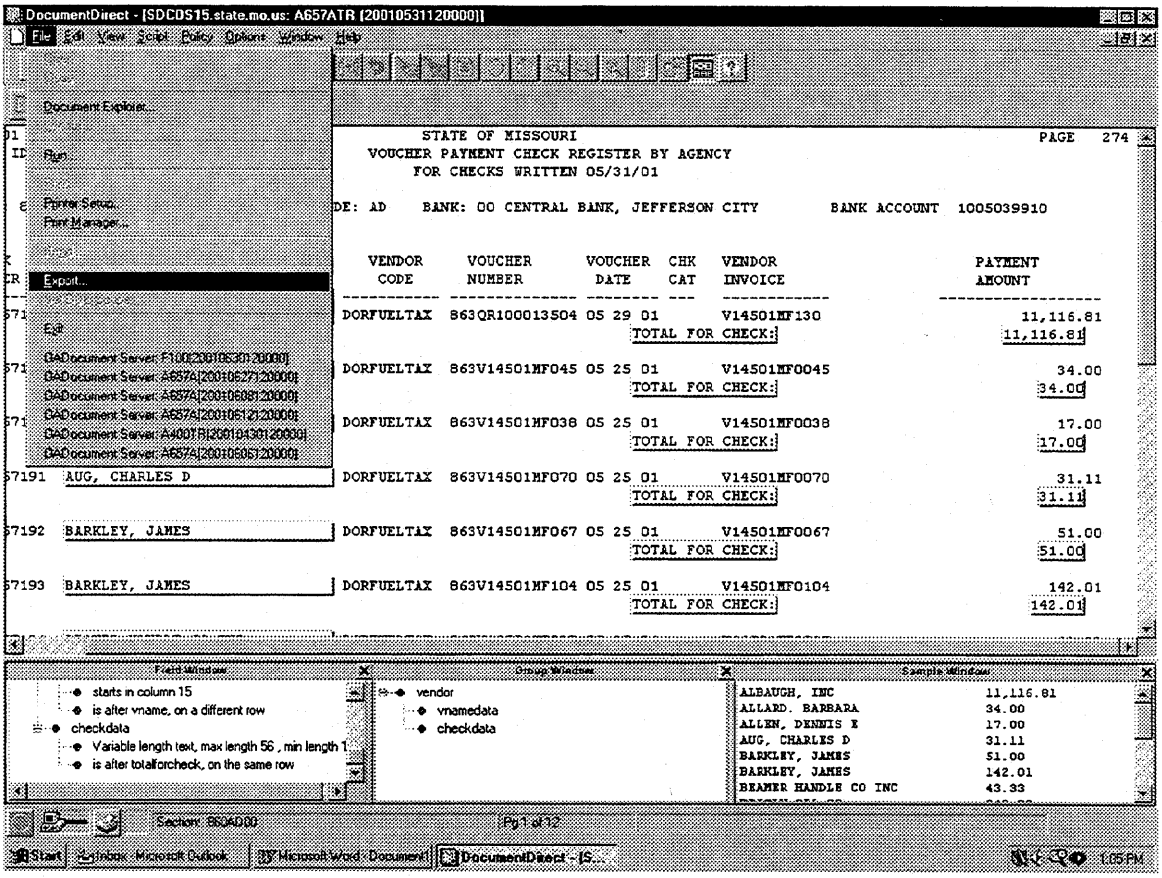


In the Group Settings dialog box type the Group name in the Group Name field. Click on the field to add to the group and click on the Add button. This will move the fields over to the Fields in the Group window in the order selected. If you want to change the order click on the field and choose the Move Up or Move Down button. The order of the fields will be the order they are exported.

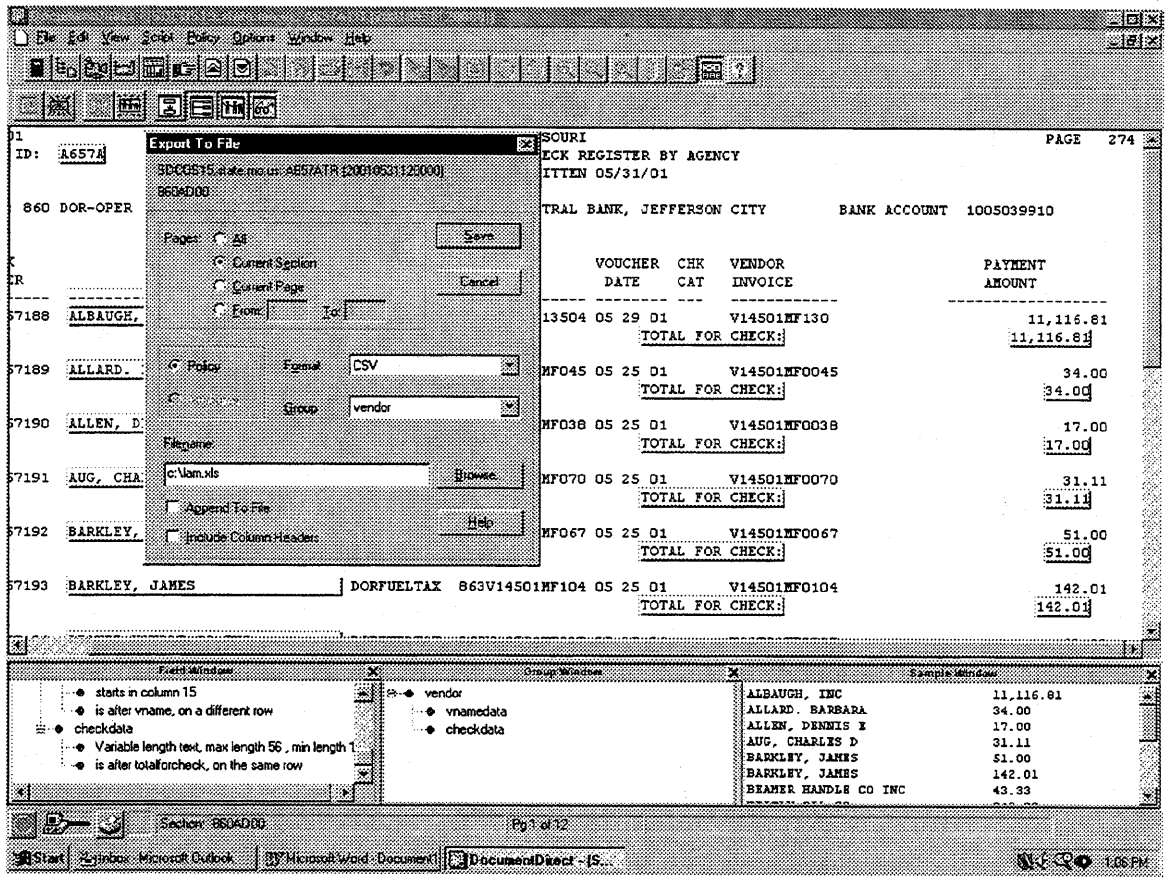
There may be multiple groups created from one policy.



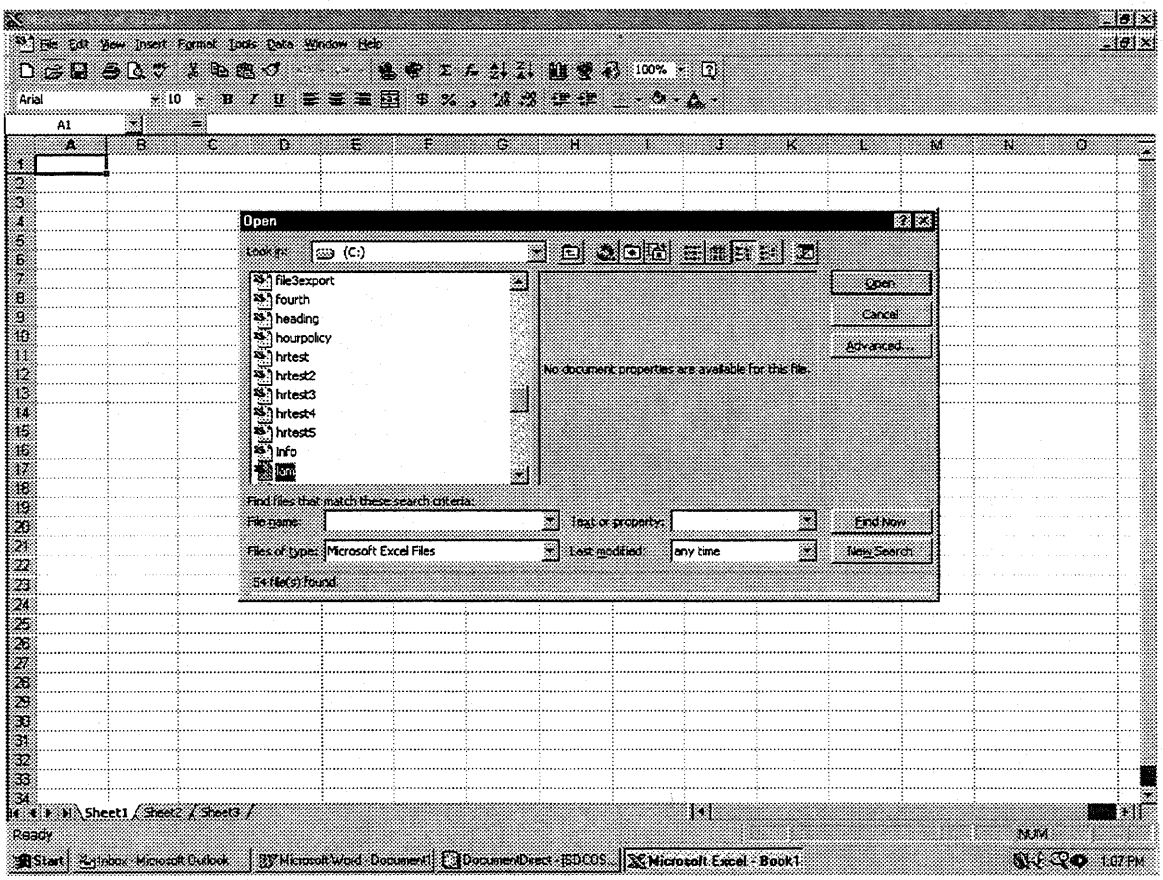
The sample window is showing the data chosen from the Group Window. This is the information that will be exported.



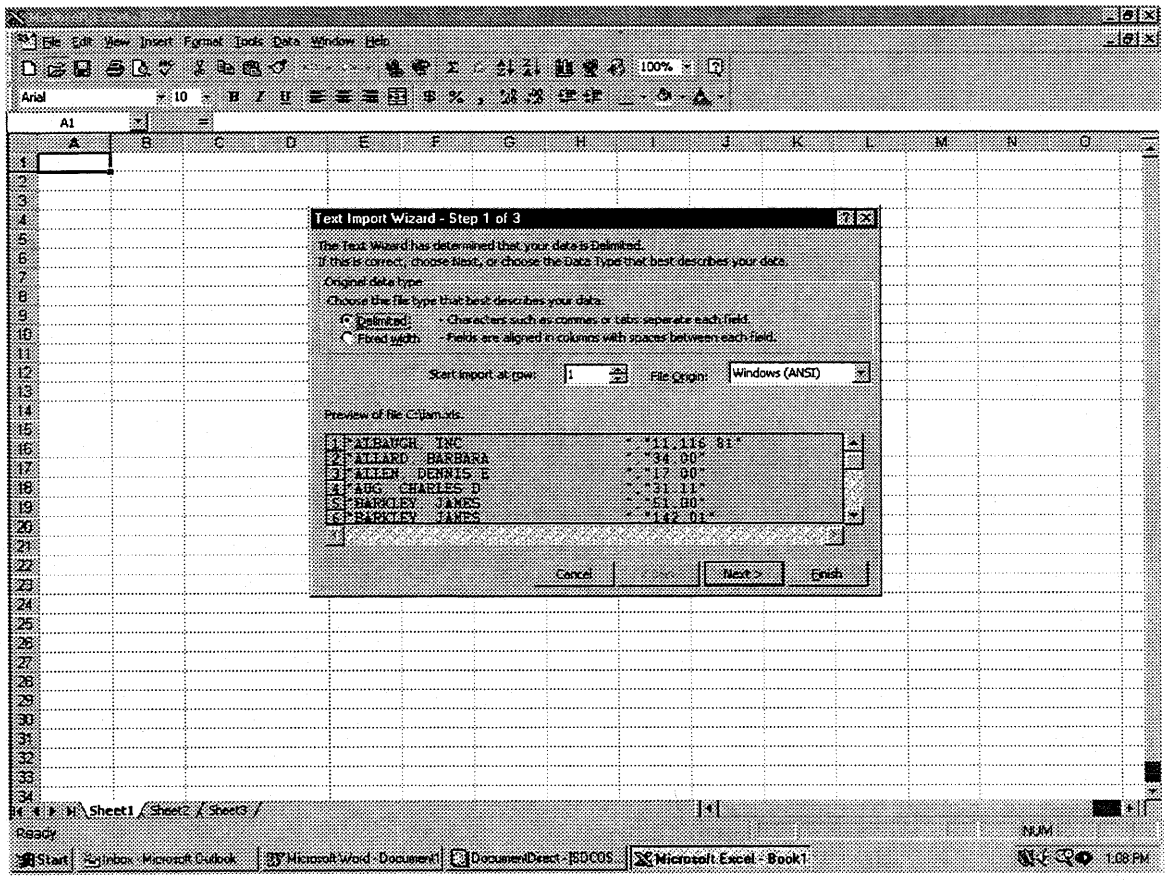
Now the policy is ready to be exported into an external application. In this example we will be exporting into Excel. Click on the file option on the menu bar and choose Export.



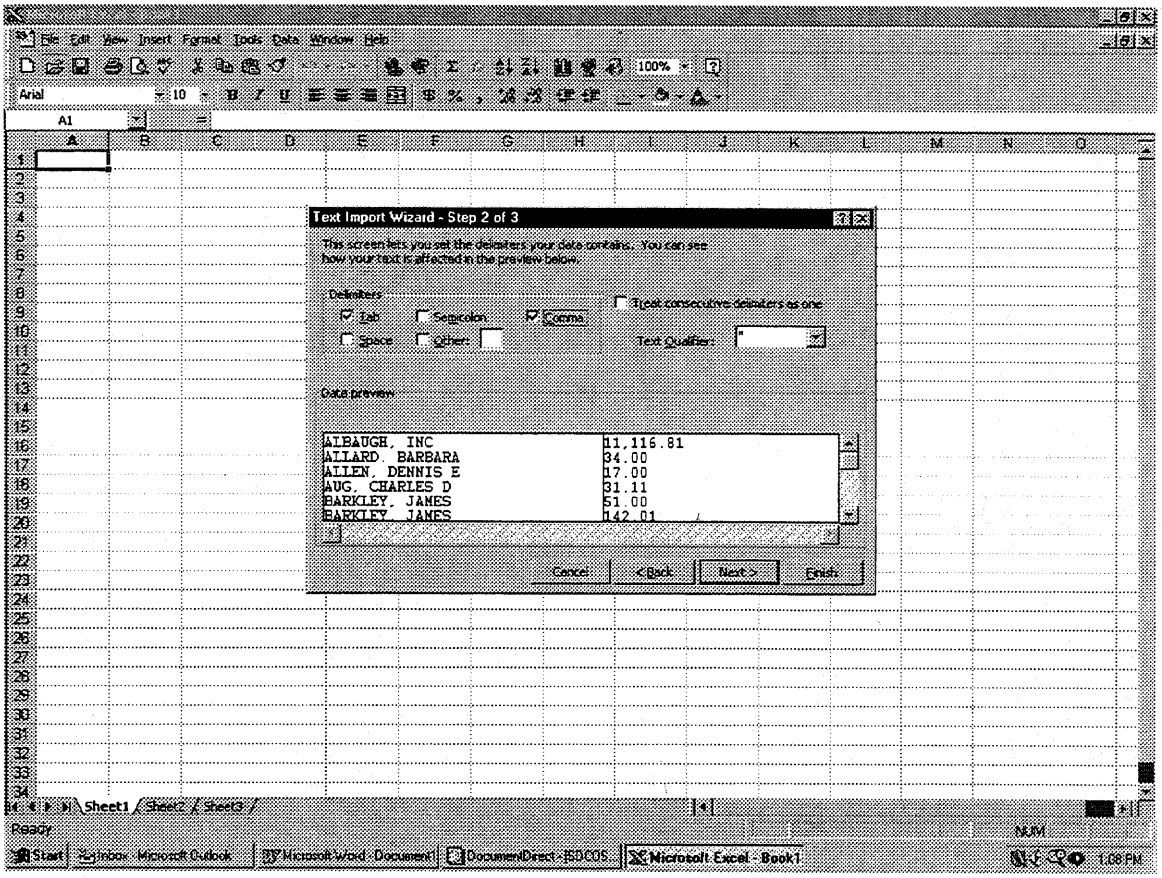
There are several options in the Export to File dialog box. Click on the appropriate pages option and type in the filename including the file extension. If exporting into Excel the extension is .xls, if exporting into Word the extension is .doc. Click on the Save button.



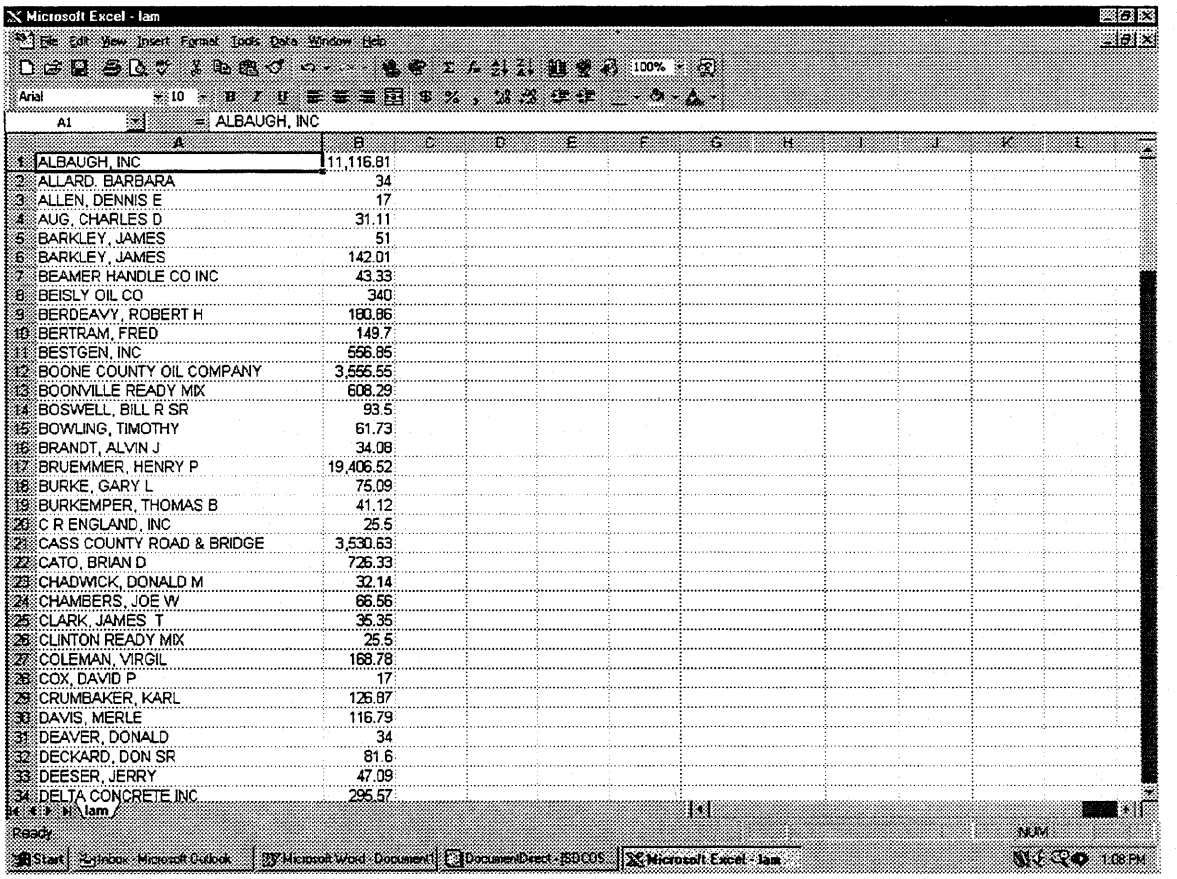
Open the file from the Excel application.



From the Import Wizard choose between Delimited and Fixed Width. Scroll down to look at how the data is separated. If you have a character such as a comma in the above example Delimited is the correct choice. Fixed width will show the data formatted in columns without a character between the columns. Click on the Next button.



In Step 2 of the Wizard choose the character that is separating the data. In this example click on Comma. The "," will now disappear and the data is separated into 2 columns. Click on the Finish button.



	A	B
1	ALBAUGH, INC	11,116.81
2	ALLARD, BARBARA	34
3	ALLEN, DENNIS E	17
4	AUG, CHARLES D	31.11
5	BARKLEY, JAMES	51
6	BARKLEY, JAMES	142.01
7	BEAMER HANDLE CO INC	43.33
8	BEISLY OIL CO	340
9	BERDEAVY, ROBERT H	180.86
10	BERTRAM, FRED	149.7
11	BESTGEN, INC	556.85
12	BOONE COUNTY OIL COMPANY	3,555.55
13	BOONVILLE READY MIX	608.29
14	BOSWELL, BILL R SR	93.5
15	BOWLING, TIMOTHY	61.73
16	BRANDT, ALVIN J	34.08
17	BRUEMMER, HENRY P	19,406.52
18	BURKE, GARY L	75.09
19	BURKEMPER, THOMAS B	41.12
20	C R ENGLAND, INC	25.5
21	CASS COUNTY ROAD & BRIDGE	3,530.63
22	CATO, BRIAN D	726.33
23	CHADWICK, DONALD M	32.14
24	CHAMBERS, JOE W	66.56
25	CLARK, JAMES T	35.35
26	CLINTON READY MIX	25.5
27	COLEMAN, VIRGIL	168.78
28	COX, DAVID P	17
29	CRUMBAKER, KARL	126.87
30	DAVIS, MERLE	116.79
31	DEAVER, DONALD	34
32	DECKARD, DON SR	81.6
33	DEESER, JERRY	47.09
34	DELTA CONCRETE INC	295.57

The data is now available in Excel.